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Fashion Accessories (Men's and Women's)

FAIRCHILD FACT FILE

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TABLE OF CONTENTS

Page

AT THE MANUFACTURER LEVEL:

MARKET TRENDS..... 1
GENERAL INDUSTRY STATISTICS..... 2
WOMEN'S NECKWEAR..... 6
EMPLOYMENT & EARNINGS..... 6
EMPLOYMENT SIZE..... 7
CONCENTRATION IN THE INDUSTRY..... 9
LOCATION OF THE INDUSTRY.....10
PRODUCTION.....13
PRODUCT SHIPMENTS.....13
JEWELRY.....14
HANDBAGS.....16
BELTS.....16
PERSONAL LEATHER GOODS.....17
MILLINERY.....17
LUGGAGE.....18
GLOVES.....18
BY LEADING STATES.....19
PRODUCER PRICE INDEX.....21
FOREIGN TRADE.....21
IMPORTS.....21
EXPORTS.....26

AT THE RETAIL LEVEL:

THE SIZE OF THE POTENTIAL MARKET.....28
WORKING WOMEN.....30
THE BRIDAL MARKET.....30
RETAIL SALES.....31
BY TYPE OF RETAIL OUTLET.....33
RETAIL OPERATING RATIOS.....37
RETAIL SALES BY MONTH.....39
RETAIL ADVERTISING.....40
CONSUMER BUYING HABITS.....40

SCHEDULE OF ADDITIONAL FACT FILES.....44

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FASHION ACCESSORIES

MARKET TRENDS

Retail sales of both men's and women's fashion accessories finished 1984 on an up-note. While the women's segment was experiencing growth from a favorable ready-to-wear fashion trend toward clean looks that encourage ornamentation, men's accessories benefited from a general trend to dress-up among young men who are the most important factor in this market. Industry executives generally expect the strong gains in retail sales of accessories to continue through 1985 as consumers' understanding of how to accessorize increases and a stepped-up emphasis on newness from manufacturers pushes the category along.

Overall, total retail sales of fashion accessories, both men's and women's, but not including jewelry, were estimated to have reached $9.5 billion in 1983, up about 12% from 1982. Retailers are reporting that in 1984 sales growth came primarily from a younger customer who was purchasing products of higher quality and fashion and was willing to pay more for these products. Accessorizing provides a relatively inexpensive way to update wardrobes--an important consideration for the army of young careerists.

Color has been a major influence in accessories in 1984, particularly in fashion items such as belts and sunglasses. Retailers report that the broadening of their selections of accessories beyond the basic black and brown to include a full array of colors, has led to a large increase in sales.

Manufacturers' forecasts for 1985 range in the area of 10-30% growth for the accessories business as a whole. The biggest sellers in 1985 are expected to be scarves, gloves and hats, due to the continued trend to more vibrant colors (WWD 3-1-85). One major manufacturer of hats and gloves has broadened its product range to include 35 different colors and patterns in their line for the fall of 1985.

Imports, a perennial trouble area for all apparel including accessories, has grown to become a major obstacle to domestic producers over the last several years. The U.S. Department of Commerce reports that the import-to-new-supply ratio for luggage and personal leather goods reached 50.1% in 1984, while the same ratio for precious metal jewelry stood at 24.9% and for costume jewelry was at 28.6%. As the U.S. dollar remains strong and cost advantages remain significant for offshore manufacturing operations, the wave of imports is not expected to subside.

According to estimates by the U.S. Department of Commerce, precious metal jewelry is expected to be the fastest growing of analyzed accessories in 1985. Shipments of luggage expected to be the second fastest growing category with handbags and purses next in growth.

MARKET TRENDS

Estimated Growth of Selected Accessory Categories, 1985

	Value of Industry Shipments % Change 1985/1984	Value of Product Shipments % Change 1985/1984
Precious metal jewelry	+ 5.1%	+ 5.0%
Leather gloves & mittens	+ 0.5	+ 0.4
Luggage	+ 2.0	+ 3.0
Handbags & purses	+ 1.2	+ 0.2

Source: U.S. Department of Commerce,
1985 U.S. Industrial Outlook
International Trade Administration

Accessories cannot be defined in a single standard industry classification whose value or size is readily measured, due to the wide variety of products in the category. Some accessories, notably belts and trimmings, such as buckles and the like, are either sold to apparel manufacturers who use them as part of their finished garments or at retail, further complicating the retail sales estimates for accessories.

The distinction between items included in the men's furnishings catetory and in men's accessories is also subject to varying interpretations. Information on men's neckwear hats and underwear is covered in detail in the Men's Furnishings & Work Wear Fact File and information on men's and women's hosiery is detailed in the Hosiery Legwear Fact File.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete Census of all manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census--the most recent done in 1982. Preliminary reports on the census have now been released, with final reports scheduled to be released throughout 1985. The following tables summarize statistics which are currently available from the Census Bureau covering 1982.

Accessories manufacturers are part of many separate industry classifications under the Standard Industrial Classification system followed in government data. In some cases, accessories are combined with manufacturers of other products such as watches and clocks.

GENERAL INDUSTRY STATISTICS

Industry Trends in Accessories Classifications, 1977, 1982

	Costume Jewelry (SIC 3961*)			Precious Metal Jewelry (SIC 3911*)		
	1982(p)	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Number of companies	773	837	- 7.6%	2,159	2,165	- 0.3%
Number of establishments, total**	784	847	- 7.4	2,193	2,206	- 0.6
Number with 20 or more employees	185	236	- 21.6	367	405	- 9.4
Employees, total (thous.)	21.1	25.0	- 15.6	35.3	42.1	- 16.2
Production workers (thous.)	15.7	20.8	- 24.5	23.7	29.2	- 18.8
Payroll (mil. $)	$ 263.6	$ 215.9	+ 22.1	$ 535.8	$ 432.0	+ 24.0
Value added by manufacture ## (mil. $)	na	485.1	--	1,278.8	979.8	+ 30.5
Value of industry shipments### (mil. $)	1,026.6	816.6	+ 25.7	3,039.1	2,107.0	+ 44.2
Capital expenditures, new (mil. $)	17.7	17.6	+ 0.6	33.4	25.6	+ 30.5

	Watches, Clocks (SIC 3873*)			Apparel Belts (SIC 2387*)		
	1982(p)	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Number of companies	216	283	- 23.7%	317	281	+ 12.8%
Number of establishments, total**	229	302	- 24.2	319	284	+ 12.3
Number with 20 or more employees	83	112	- 26.0	143	119	+ 20.2
Employees, total (thous.)	16.6	31.5	- 47.3	11.7	9.4	+ 24.5
Production workers (thous.)	12.2	24.0	- 49.2	9.2	7.3	+ 26.0
Payroll (mil. $)	$ 245.4	$ 316.6	- 22.5	$ 137.1	$ 76.1	+ 80.2
Value added by manufacture ##(mil. $)	na	684.5	--	305.4	150.3	+103.2
Value of industry shipments### (mil. $)	1,167.1	1,594.7	- 26.8	556.5	286.9	+ 94.0
Capital expenditures, new (mil. $)	14.6	23.2	- 37.1	8.3	2.5	+232.0

	Fabric Dress & Work Gloves (SIC 2381*)			Leather Gloves (SIC 3151*)		
	1982	1977	% Change 1982/1977	1982(p)	1977	% Change 1982/1977
Number of companies	78	100	- 22.0%	79	84	- 6.0%
Number of establishments, total**	102	132	- 22.7	96	101	- 5.0
Number with 20 or more employees	64	92	- 30.4	54	66	- 18.2
Employees, total (thous.)	6.8	10.9	- 37.6	3.9	5.5	- 29.1
Production workers (thous.)	6.1	9.9	- 38.4	3.3	4.7	- 29.8
Payroll (mil. $)	$ 51.2	$ 69.0	- 25.8	$ 36.6	$ 33.9	+ 8.0
Value added by manufacture ##(mil. $)	104.7	160.9	- 34.9	na	67.6	--
Value of industry shipments### (mil. $)	208.4	312.4	- 33.3	177.6	178.0	- 0.2
Capital expenditures, new (mil. $)	3.4	3.5	- 2.9	0.7	1.9	- 63.2

(continued)

Industry Trends in Accessories Classifications, 1977, 1982 (continued)

	Women's Handbags (SIC 3171*)			Small Leather Goods (SIC 3172*)		
	1982(p)	1977	% Change 1982/1977	1982(p)	1977	% Change 1982/1977
Number of companies	369	404	- 8.7%	236	253	- 6.7%
Number of establishments, total**	376	418	- 10.0	242	260	- 6.9
Number with 20 or more employees	148	186	- 20.4	86	97	- 11.3
Employees, total (thous.)	15.3	20.3	- 24.6	9.7	11.9	- 18.5
Production workers (thous.)	13.1	18.2	- 28.0	7.2	9.6	- 25.0
Payroll (mil. $)	$ 158.2	$ 144.0	+ 9.9	$ 109.0	$ 108.1	+ 0.8
Value added by manufacture## (mil. $)	na	266.5	--	na	205.8	--
Value of industry shipments### (mil. $)	622.9	505.2	+ 23.3	402.5	366.8	+ 9.7
Capital expenditures, new (mil. $)	5.6	6.6	- 15.2	2.9	4.8	- 39.6

	Luggage (SIC 3161*)			Millinery (SIC 2351*)		
	1982(p)	1977	% Change 1982/1977	1982(p)	1977	% Change 1982/1977
Number of companies	287	286	+ 0.3%	105	151	- 30.5
Number of establishments, total**	293	298	- 1.7	104	151	- 31.1
Number with 20 or more employees	132	130	+ 1.5	35	47	- 25.5
Employees, total (thous.)	16.1	19.2	- 16.1	2.5	2.7	- 7.4
Production workers (thous.)	12.5	15.8	- 20.9	2.1	2.2	- 4.5
Payroll (mil. $)	$ 194.4	$ 164.1	+ 18.5	$ 24.3	$ 20.2	+ 20.3
Value added by manufacture## (mil. $)	na	328.3	--	na	32.8	--
Value of industry shipments### (mil. $)	792.7	654.9	+ 21.0	88.7	75.1	+ 18.1
Capital expenditures, new (mil. $)	12.9	8.1	+ 59.3	0.4	0.2	+100.0

na not available (p) preliminary

*Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made as shown below. In some cases (i.e. Watches, Clocks), non-accessory products are included in the classification.

SIC 3961 covers manufacturers specializing in the production of costume jewelry, costume novelties and ornaments made of all materials except precious metal, etc.

SIC 3911 covers manufacturers specializing in the production of jewelry and other articles worn on or carried about the person, made of precious metals with or without stones, including cigarette cases and lighters, vanity cases and compacts; trimmings for umbrellas and canes; and jewel settings and mountings.

SIC 3873 covers manufacturers specializing in the production of clocks, watches, watchcases, mechanisms for clockwork-operated devices and clock and watch parts, as well as establishments primarily engaged in assembling clocks and watches from purchased movements and cases.

SIC 2387 covers manufacturers specializing in the production of men's and women's apparel belts, regardless of material.

(continued)

GENERAL INDUSTRY STATISTICS

SIC 2381 covers manufacturers specializing in the production of dress, semi-dress, and work gloves and mittens, cut and sewn from purchased woven or knit fabric, or these fabrics combined with leather or plastic.

SIC 3151 covers manufacturers specializing in the production of dress, semi-dress, and work gloves exclusively of leather or leather with lining of other material.

SIC 3171 covers manufacturers specializing in the production of women's handbags and purses of leather or other materials, except precious metals.

SIC 3172 covers manufacturers specializing in the production of small articles, such as billfolds, key cases, and coin purses of leather or other materials, except precious metals.

SIC 3161 covers manufacturers specializing in the production of luggage of leather or other material.

SIC 2351 covers manufacturers specializing in the production of women's, misses', children's and infants' millinery.

**Each business location is counted as a separate establishment.

Note: Dollar values are in terms of current dollars--not adjusted for inflation. This should be taken into account when comparing results for 1982 and 1977.

##Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

###Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts for contract work and resales). Available data on the total value of specific products shipped by both those classified in the industry (primary producers) and by secondary producers (who are classified in other industries) are covered in the value of shipments reported on pages 14-19.

Source: U.S. Bureau of the Census
Census of Manufactures, 1982
Industry Series (Preliminary)

GENERAL INDUSTRY STATISTICS

Women's Neckwear

It should be noted that women's scarves and other neckwear, which have become important accessory items in today's fashions, are not separately reported in U.S. Census Bureau data but are included in the broad classification Women's, Misses' & Juniors' Outerwear, Not Elsewhere Classified (SIC 2339). Limited information should be included in the final Industry Series report on this classification when released later in 1985.

Data on imports, which are a very important segment of the total U.S. market, will be found in the section on FOREIGN TRADE.

Employment & Earnings

In October 1984, compared with October 1983, production worker employment in every measured segment of the accessory market declined, with the exception of the watches and clocks area, which recorded an increase of 8.2%. This continues a trend of many years of declining employment due to the high labor intensity of the accessory business overall and thus the cost advantages of moving production operations overseas to countries with significantly lower labor costs. Average weekly earnings have, on the other hand, continued to show gains.

It should be noted that the Bureau of Labor Statistics uses a different methodology in compiling employment data than used by the Census Bureau, and the figures of these two sources are not directly comparable.

Employment & Earnings in Specified Accessories Industries, 1982, 1983 Average & October 1983, 1984

	October		% Change	Annual Average		% Change
	1984	1983	1984/1983	1983	1982	1983/1982
Costume jewelry (SIC 3961)						
All employees (thous.)	22.1	21.3	+ 3.8%	20.4	20.3	+ 0.5%
Production workers (thous.)	17.3	17.8	- 2.8	15.8	15.7	+ 0.6
Avg. weekly hours	36.2	35.6	+ 1.7	34.9	38.0	- 8.2
Avg. weekly earnings	$191.50	$184.05	+ 4.0	$183.23	$194.18	- 5.6
Precious metals jewelry (SIC 3911)						
All employees (thous.)	37.3	38.0	- 1.8	35.7	36.2	- 1.4
Production workers (thous.)	26.1	27.3	- 4.4	25.2	25.5	- 1.1
Avg. weekly hours	39.5	38.8	+ 1.8	37.4	37.3	+ 0.3
Avg. weekly earnings	$306.92	$288.67	+ 6.3	$269.28	$257.00	+ 4.8

(continued)

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in Specified Accessories Industries, 1982, 1983 Average & October 1983, 1984
(continued)

	October		% Change	Annual Average		% Change
	1984	1983	1984/1983	1983	1982	1983/1982
Women's handbags & personal leather goods (SIC 317)						
All employees (thous.)	28.3	29.8	- 5.0%	27.0	28.1	- 3.9%
Production workers	23.0	24.7	- 6.9	22.1	22.9	- 3.5
Avg. weekly hours	36.7	38.3	- 4.2	37.5	36.0	+ 4.2
Avg. weekly earnings	$205.15	$198.78	+ 3.2	$194.25	$177.12	+ 9.7
Watches, clocks & watchcases (SIC 387)						
All employees (thous.)	16.6	16.0	+ 3.8	16.1	17.7	- 9.0
Production workers (thous.)	11.9	11.0	+ 8.2	11.0	12.3	- 10.6
Avg. weekly hours	41.8	39.6	+ 5.6	39.5	38.8	+ 1.8
Avg. weekly earnings	$280.90	$253.04	+11.0	$250.04	$237.46	+ 5.3
Luggage (SIC 316)						
All employees (thous.)	12.0	12.8	- 6.3	12.4	13.7	- 9.5
Production workers	9.0	9.5	- 5.3	8.9	10.1	- 11.9
Avg. weekly hours	38.1	38.7	- 1.6	38.2	35.0	+ 9.1
Avg. weekly earnings	$243.84	$244.20	- 0.1	$239.51	$202.30	+ 18.4

Source: U.S. Bureau of Labor Statistics, Employment & Earnings

Employment Size

The majority of manufacturing facilities in every measured segment of the accessories industry employed fewer than 49 employees in 1982, according to the Census Bureau. The segment with the greatest concentration of small plants was the costume jewelry group which had 56.3% of its plants employing less than 10 employees. In second position was small leather goods with 52.7% of its plants employing less than 10 employees, according to County Business Patterns, an annual report compiled by the U.S. Census Bureau covering establishments active as of December 15 which had one or more paid employees. County Business Patterns are tabulated from universe files.

GENERAL INDUSTRY STATISTICS

Employment Size

Number of Accessory Manufacturing Establishments
By Employment Size, 1982

	Costume Jewelry (SIC 3961)		Precious Metal Jewelry (SIC 3911)		Apparel Belts (SIC 2387)	
	No.	% of total	No.	% of total	No.	% of total
Total establishments*	673	100.0%	1,964	100.0%	262	100.0%
Employment size:						
Under 10 employees	379	56.3	1,308	66.6	94	35.9
10-49 employees	211	31.4	518	26.4	102	38.9
50-249 employees	69	10.3	121	6.2	61	23.3
250 or more employees	14	2.1	17	0.9	5	1.9

	Watches, clocks & watchcases (SIC 387)		Fabric Dress & Work Gloves (SIC 2381)		Small Leather Goods (SIC 3172)	
	No.	% of total	No.	% of total	No.	% of total
Total establishments*	198	100.0%	101	100.0%	230	100.0%
Employment size:						
Under 10 employees	87	43.9	14	13.9	107	46.5
10-49 employees	60	30.3	43	42.6	76	33.0
50-249 employees	30	15.2	39	38.6	40	17.4
250 or more employees	21	10.6	5	5.0	7	3.0

	Leather Gloves & Mittens (SIC 315)		Women's Handbags (SIC 3171)		Luggage (SIC 316)	
	No.	% of total	No.	% of total	No.	% of total
Total establishments*	94	100.0%	336	100.0%	257	100.0%
Employment size:						
Under 10 employees	29	30.9	121	36.0	79	30.7
10-49 employees	39	41.5	136	40.5	110	42.8
50-249 employees	26	27.7	64	19.0	55	21.4
250 or more employees	--	--	15	4.5	13	5.1

	Millinery (SIC 2351)	
	No.	% of total
Total establishments*	92	100.0%
Employment size:		
Under 10 employees	33	35.9
10-49 employees	46	50.0
50-249 employees	13	14.1
250 or more employees	--	--

* Includes only establishments with payrolls which were active as of December 15, 1982.

Source: U.S. Bureau of the Census,
County Business Patterns, 1982

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

According to Sales & Marketing Management magazines' survey of industrial buying power, the share of accessory shipments accounted for by plants with 100 or more employees declined for all measured accessory categories between 1982 and 1983. During the same period, the number of plants with 100+ employees registered declines in five of the nine categories.

The latest government data on concentration in the accessory industry comes from the 1977 Census of Manufactures, the results of which are summarized below. Results on concentration from the 1982 census are scheduled to be released by the bureau early in 1986.

Employment & Share of Industry Shipments in Large Accessories Manufacturing Plants, 1982, 1983

	Number of Plants		% of Industry Shipments
	With 20+ Employees	With 100+ Employees	Accounted for by Plants With 100 or More Employees
Precious metal jewelry (SIC 3911*)			
1983	521	93	55%
1982	484	91	56
Costume jewelry (SIC 3961*)			
1983	304	64	59
1982	296	71	64
Watches, clocks & watchcases (SIC 3873*)			
1983	124	54	89
1982	115	57	92
Women's handbags (SIC 3171*)			
1983	140	42	71
1982	133	48	76
Personal leather goods (SIC 3172*)			
1983	123	35	70
1982	121	35	72
Fabric dress & work gloves (SIC 2381*)			
1983	126	49	76
1982	135	57	78
Leather gloves & mittens (SIC 3151*)			
1983	67	17	61
1982	67	19	66
Luggage (SIC 3161*)			
1983	126	36	73
1982	113	35	76
Apparel belts (SIC 2387*)			
1983	110	27	57
1982	103	25	58
Millinery (SIC 2351*)			
1983	46	4	29
1982	na	na	na

na not available

Source: Sales & Marketing Management
"Survey of Industrial Purchasing Power"
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GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Concentration Ratios Among Companies Manufacturing Accessories, 1977

Industry	Value of Shipments (Mil. $)	Percent Accounted For By: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Precious metal jewelry (SIC 3911*)	$ 2,107.0	18.1%	24.0%	34.6%	48.2%
Costume jewelry (SIC 3961*)	816.6	23.3	32.5	47.3	63.2
Watches, clocks & watchcases (SIC 3873*)	1,594.7	58.1	64.2	79.6	91.6
Women's handbags (SIC 3171*)	505.2	21.4	30.8	48.1	70.4
Personal leather goods (SIC 3172*)	366.8	38.3	49.4	66.9	85.7
Fabric dress & work gloves (SIC 2381*)	312.4	44.5	63.1	82.4	95.8
Leather gloves & mittens (SIC 3151*)	178.0	38.2	53.9	78.7	96.9
Luggage (SIC 3161*)	654.9	39.5	49.9	65.9	84.6
Apparel belts (SIC 2387*)	286.9	20.8	32.3	51.0	71.0
Millinery (SIC 2351*)	75.1	18.7	27.8	48.2	78.8

Source: U.S. Bureau of the Census,
Census of Manufactures, 1977
Concentration Ratios in Manufacturing
MC77-SR-9

Location of the Industry

Most manufacturers classified in accessories product classifications are concentrated in New York State--including eight out of the 10 of the reported industry classifications (SIC). Plants in New York accounted for more than half the value of industry shipments of women's handbags and purses, as well as in the millinery industry. However, the costume jewelry industry is most heavily concentrated in Rhode Island.

Following industry trends, as previously covered, industries in the accessories classification have been diminishing in size. In New York State, of the eight classifications where the state predominated, employment in 1982 was below the comparable total for 1977, for a loss of almost 7,000 jobs. Only in the belts industry and millinery industry were gains reported in total employment, for a total of 2,000 jobs.

GENERAL INDUSTRY STATISTICS

Location of the Industry

Leading States in the Manufacture of Specified Accessories, 1982
(Figures are preliminary, except where noted)

	No. of Establishments			
	Total	With 20+ Employees	Value of Industry Shipments	% of Total
Costume jewelry (SIC 3961), total	784	185	$ 1,026.6	100.0%
Leading states:				
Rhode Island	299	91	536.1	52.2
New York	177	38	120.9	11.8
California	73	9	46.0	4.8
Massachusetts	35	16	130.0	12.7
New Jersey	22	7	43.3	4.2
Precious metal jewelry (SIC 3911) total*	2,193	367	3,039.1	100.0
Leading states:				
New York	770	161	1,190.7	39.2
California	270	29	260.7	8.6
Rhode Island	233	60	480.9	15.8
Florida	110	11	97.4	3.2
Texas	77	14	170.1	5.6
Watches, clocks & watchcases (SIC 3873), total	229	83	1,167.7	100.0
Leading states:				
New York	49	18	204.7	17.5
Illinois	17	6	65.8	5.6
Massachusetts	11	4	43.4	3.7
Michigan	9	5	70.5	6.0
Pennsylvania	9	5	48.9	4.2
Women's handbags & purses (SIC 3171), total	376	148	622.9	100.0
Leading states:				
New York	186	78	342.6	55.0
California	39	10	28.7	4.6
Massachusetts	20	8	30.7	4.9
New Jersey	20	11	41.9	6.7
Florida	19	8	31.1	5.0
Texas	13	6	13.1	2.1
Pennsylvania	10	3	14.9	2.4
Personal leather goods (SIC 3172), total	242	86	405.6	100.0
Leading states:				
New York	69	26	109.5	27.2
California	53	13	20.3	5.0
New Jersey	13	7	48.8	12.1
Massachusetts	12	6	56.3	14.0

(continued)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Leading States in the Manufacture of Specified Accessories, 1982
(Figures are preliminary, except where noted)
(continued)

	No. of Establishments		Value of Industry Shipments	% of Total
	Total	With 20+ Employees		
Leather gloves & mittens (SIC 3151), total	96	54	$ 177.6	100.0
Leading states:				
New York	24	10	61.6	34.7
Wisconsin	16	10	21.1	11.9
Fabric dress & work gloves (SIC 2381), total	102	64	419.3	100.0
Leading states:				
North Carolina	14	11	40.2	9.6
Mississippi	12	9	(D)	--
New York	11	3	23.6	5.6
Georgia	6	6	5.8	1.4
Apparel belts (SIC 2387), total	319	143	556.5	100.0
Leading states:				
New York	165	73	236.9	42.6
California	40	16	44.0	7.9
Texas	25	14	51.2	9.2
Pennsylvania	13	8	40.5	7.3
Florida	10	2	4.3	0.8
Millinery (SIC 2351), total	104	35	88.7	100.0
Leading states:				
New York	69	22	54.9	61.9
Luggage (SIC 3161), total	293	132	792.7	100.0
Leading states:				
New York	64	40	149.7	18.9
California	43	18	49.3	6.2
Illinois	27	12	28.7	3.6
New Jersey	16	6	12.5	1.6
Florida	14	6	33.1	4.2

* Final, revised 1982 figures
(D) Withheld to avoid disclosing data for individual companies.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
Industry Series

PRODUCTION

Information on production of accessories by U.S. producers is very limited, but may be covered in some detial in final 1982 census of manufactures data.

The following estimates have been compiled by the National Cotton Council of America.

Production of Gloves & Handkerchiefs, 1982, 1983
(thousands of dozens)

	1983	1982
Gloves & mittens (men's & women's) (pairs)	19,286	21,541
Principally knit	6,325	7,450
Principally woven	12,352	13,335
Leather & fabric combination, excluding all-leather	609	756
Handkerchiefs (men's)	15,156	14,434
Handkerchiefs (women's)	2,618	2,493

Source: Economic Services, National Cotton Council of America
Cotton Counts Its Customers.

PRODUCT SHIPMENTS

Estimates of shipments on a product basis are compiled annually by the U.S. Bureau of Industrial Economics and are published in the U.S. Industrial Outlook. These figures cover shipments by all U.S. producers, regardless of primary industry classifications.

As indicated by the compound annual growth rates, the domestic accessory business has been in a tailspin in recent years. For every measured category the compound growth rate was lower in the 1977-1982 period than it was in the 1972-1982 period.

Imports are the major cause of the decline in the accessory business. For the most part accessories tend to be a highly labor intensive industry which allows for quite significant cost differentials for manufacturers who are overseas, in developing countries. In the luggage and personal leather goods segment, the import-to-new supply ratio has risen constantly since 1974 rising from 18.7% to 38.7% in 1982.

According to the U.S. Department of Commerce, the total value of product shipments in 1984 in the luggage and personal goods industry rose to $2.1 billion, up 3.3% from $1.9 billion in 1983. This increase was the result of the overall economic recovery. Measured on a constant dollar basis (1972 dollars) product shipments remained virtually unchanged.

The jewelry area, however, has fared better than others. The slow recovery which began in 1983, gained some momentum in 1984, led by precious metal jewelry. The value of product shipments of precious metal jewelry in 1984 was $3.7 billion (current dollars); those of costume jewelry, $1.0 billion. Adjusted for inflation, shipments were down 9% and up 1% respectively from 1983.

PRODUCT SHIPMENTS

Shipments of precious metal jewelry, according to industry analysts, were aided by lower gold prices, while those of costume jewelry were adversely affected by a surge in imports. Industry analysts also cite as a reason for the slow growth of the jewelry business consumers postponing purchases in favor of higher priced necessities such as appliances and automobiles.

Estimated Value of Product Shipments (By All Producers)
(Millions of Dollars)

	Current Dollars		Constant (1972) Dollars			Current Dollars Compound Annual Rate of Growth	
	1984	1983	1985	1984	1983	1972-1982	1977-1982
Jewelry							
Precious metal	$3,392	$3,460	$ 668	$ 636	$ 699	11.0%	7.9%
Costume	997	980	670	650	645	7.9	3.9
Leather accessories	2,058	1,992	1,040	1,033	1,034	5.1	2.0
Leather gloves & mittens	136	134	49	48	49	5.7	2.6
Luggage	729	707	340	334	321	7.2	2.1
Handbags & purses	589	543	339	321	317	4.3	3.7
Small leather goods	414	396	240	239	233	5.1	0.6

Source: International Trade Administration, 1985 U.S. Industrial Outlook.

Details on the quantity and value of accessories products shipped by all manufacturers have been released based on the 1982 census of manufactures, either in preliminary or final form, as noted below. Comparisons are shown with 1977 census data.

Jewelry

Value of Shipments of Jewelry by All U.S. Producers, 1977, 1982
(Millions of Dollars)

	1982	1977	% Change 1982/1977
Precious metal jewelry, total	$2,823.2	$1,907.7	+ 48.0%
Jewelry, made of platinum metals & karat gold, total	2,076.5	1,125.1	+ 84.6
Fraternal, college & school rings	253.1	172.1	+ 47.0
Wedding rings	294.2	133.2	+120.9
Other rings	436.4	312.6	+ 39.6
Ring mountings for sale separately	115.2	69.3	+ 66.2
Women's & children's jewelry, incl. necklaces, bracelets, broaches, pins, clips, earrings, etc.	715.8	327.8	+118.4

(continued)

PRODUCT SHIPMENTS

Jewelry

Value of Shipments of Jewelry by All U.S. Producers, 1977, 1982
(Millions of Dollars)
(continued)

	1982	1977	% Change 1982/1977
Jewelry made of platinum metals & karat gold, total (continued)			
Watch attachments	30.7	31.4	- 2.2%
Organizational jewelry	40.6	44.7	- 9.2
Other, incl. men's religious jewelry, cigarette cases, lighters, compacts, vanity cases, etc.	152.1	52.3	+190.8
Jewelry, n.s.k.	38.4	108.0	- 64.4
Jewelry of precious metals, excl. platinum or karat gold, total	411.0	353.0	+ 16.4
Rings & ring mountings	44.8	35.3	+ 26.9
Men's jewelry	40.5	33.0	+ 22.7
Women's & children's jewelry	218.7	184.3	+ 18.7
Bracelets for watches	40.1	38.1	+ 5.2
Other jewelry	63.2	38.1	+ 65.9
Jewelry, n.s.k.	3.6	24.1	- 85.1
Other jewelry of precious metal	335.7	303.1	+ 10.8
Costume jewelry, total	944.9	781.5	+ 20.9
Base metal:			
Rings & ring mountings	129.1	43.3	+198.2
Men's jewelry, excl. watch attachments & rings	30.5	53.1	- 42.5
Women's & children's jewelry & costume novelties	429.2	402.3	+ 6.7
Bracelets for watches & fraternal, college & school jewelry	82.8	43.2	+ 91.7
Other jewelry, incl. religious	34.3	25.6	+ 34.0
Imitation pearls	5.8	14.3	- 59.4
Compact & vanity cases	74.7	36.2	+106.4
Other costume jewelry made of plastic, wood, leather, etc.	38.3	42.0	- 8.8
Costume jewelry, n.s.k.	120.3	121.4	- 0.9

n.s.k. not specified by kind.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
MC-82-39A & MC82-I-39C-5.

PRODUCT SHIPMENTS

Handbags

Quantity & Value of Shipments of All U.S. Producers
Of Women's Purses & Handbags, 1977, 1982
(Value in millions of dollars; quantity in thousands of units)

	Quantity		% Change	Value		% Change
	1982(p)	1977	1982/77	1982(p)	1977	1982/77
Women's purses & handbags	na	na	--	$524.1	$436.2	+ 20.2%
All leather & chiefly leather	13.2	(S)	--	234.9	109.4	+114.7
Plastics or chiefly plastic	12.4	25.1	- 50.6%	111.6	154.6	- 27.8
Other materials exc. precious metal	11.4	(S)	--	72.1	53.2	+ 35.5
Women's & children's handbags, n.s.k.	na	na	--	105.4	119.0	- 11.4

(p) preliminary
na not available
n.s.k. not specified by kind

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Preliminary Report Series,
MC82-I-31B-3(P), March 1984.

Belts

Quantity & Value of Shipments of Apparel Belts by All U.S. Producers
1977, 1982
(Value in millions of dollars; quantity in thousands of dozens)

	Quantity		% Change	Value		% Change
	1982(p)	1977	1982/77	1982(p)	1977	1982/77
Apparel belts, total	na	na	--	$482.6	$244.3	+ 97.5%
Leather, total	na	7,040.0	--	269.6	155.5	+ 73.4
Women's & children's	3,983.6	1,442.0	+176.3%	96.8	32.3	+199.7
Men's & boys'	6,155.1	5,466.0	+ 12.6	166.0	119.5	+ 38.9
Not specified	na	132.0	--	6.8	3.7	+ 83.3
Other materials	na	5,983.0	--	164.8	58.2	+183.2
Women's & children's	11,231.9	4,613.0	+143.5	111.1	39.1	+184.1
Men's & boys'	4,319.0	715.0	+504.0	49.6	13.2	+275.7
Not specified	na	655.0	--	4.2	5.9	- 28.8
Materials unspecified	na	na	--	49.2	30.6	+ 60.8

(p) preliminary
na not available

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Preliminary Report Series,
MC82-I-23D-6(P), March 1984.

PRODUCT SHIPMENTS

Personal Leather Goods

Quantity & Value of Shipments of Personal Leather Goods By All Producers, 1977, 1982
(Value in millions of dollars; quantity in thousands of units)

	Quantity		% Change	Value		% Change
	1982(p)	1977	1982/77	1982(p)	1977	1982/77
Personal leather goods, total	na	na	--	$379.5	$369.2	+ 2.8%
Billfolds, wallets, french purses, & clutches	45,610.8	na	--	186.7	136.0	+ 37.3
Leather	27,381.1	23,078.2	+ 18.6%	157.5	125.3	+ 25.7
All other materials	18,229.7	na	--	29.1	10.7	+172.0
Travel kits (fitted & unfitted)	1,848.5	na	--	10.0	21.9	- 54.3
Jewelry boxes & cases, exc. precious metal	na	13,091.2	--	17.4	47.1	- 63.1
Leather compacts and vanity cases	1,256.3	na	--	1.8	na	--
Other personal goods, incl. key, cigarette, eyeglass, pass card & instrument cases; pocket secretaries; tobacco pouches, cosmetic bags, etc.	na	na	--	102.3	97.9	+ 4.5
Leather	na	na	--	38.1	55.8	- 31.7
All other materials	na	na	--	64.2	42.1	+ 52.5
Personal leather goods, n.e.c.	na	na	--	61.3	66.3	- 7.5

na not available
n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Preliminary Report Series, MC82-I-31B-4(P), March 1984.

Millinery

Quantity & Value of Shipments of Millinery Products By All U.S. Producers, 1982(p), 1977
(Value in millions of dollars; quantity in thousands of dozens)

	Quantity		% Change	Value		% Change
	1982(p)	1977	1982/77	1982(p)	1977	1982/77
Millinery total	na	na	--	$ 87.1	$ 74.2	+ 17.4
Fur-felt & wool felt millinery	267.7	215.0	+ 24.5%	18.2	12.5	+ 45.6
Fabric millinery (made from all types fabrics)	800.6	496.0	+ 61.4	20.5	12.3	+ 66.7
All other millinery	435.1	140.0	+210.7	21.7	14.7	- 47.6
Millinery, n.s.k.	na	na	--	20.6	34.7	- 23.3

na not available
n.s.k. not specified by kind

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Preliminary Report Series, MC82-I-23C-3(P)

PRODUCT SHIPMENTS

Luggage

Quantity & Value of Shipments of Luggage
By All U.S. Producers, 1977, 1982
(Quantities in thousands; value in millions of dollars)

	Quantity		% Change	Value		% Change
	1982(p)	1977	1982/77	1982(p)	1977	1982/77
Luggage, total	na	na	--	$648.3	$585.3	+ 16.9%
Women's hand luggage, all types except zippered	2,432.7	5,123.0	- 52.5%	88.2	107.5	- 18.0
Soft side (lock construction)	(S)	1,946.4	--	21.2	35.5	- 40.3
Other (including hard side & fully or semi-molded)	(D)	3,176.6	--	67.0	72.0	- 6.9
Men's hand luggage, all types except zippered	1,169.5	2,956.9	- 60.4	50.5	65.8	- 23.3
Molded (fully or semi-molded)	901.6	1,559.4	- 42.2	31.5	35.7	- 11.8
Other (including hard & soft side)	267.9	397.5	- 32.6	19.0	30.1	- 36.9
Men's & women's zippered hand luggage	6,304.7	9,916.7	- 36.4	165.7	147.1	+ 12.6
Occupational luggage cases, sample case, etc.	5,324.3	3,569.7	+ 49.2	45.1	32.5	+ 38.8
Trunks, hand trunks & lockers	985.9	1,619.9	- 39.1	23.0	19.3	+ 19.2
Briefcases, envelopes, school bags	3,663.4	5,395.2	- 32.1	34.9	27.8	+ 25.5
Attache cases	2,157.0	3,857.7	- 44.1	56.4	58.3	- 3.3
Other (musical instrument cases, etc.	9,050.6	na	--	65.3	37.6	+ 73.3
Luggage, n.s.k.	na	na	--	104.6	79.7	+ 32.2

na not available
n.s.k. not specified by kind
(S) Surpressed
(D) Withheld to avoid disclosure

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Preliminary Report Series,
MC82-I-31B-2(P)

Gloves

Later data (covering 1983) is available on shipments of gloves by U.S. manufacturers than for other accessories classifications through the Current Industrial Reports Series compiled on the basis of a survey by the Census Bureau covering manufacturers of leather, fabric, rubber and plastic gloves and mittens, as well as jobbers.

PRODUCT SHIPMENTS

Gloves

Quantity & Value of Shipments of Gloves & Mittens
By All U.S. Producers, 1982, 1983

	Quantity (Thous. Doz.)		% Change	Value (Mil. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Dress & semidress gloves & mittens, total	2,253	1,899	+ 18.6%	$ 73.1	$ 67.4	+ 8.5%
By material:						
All knit fabric, seamless	1,367	1,040	+ 31.4	16.3	13.9	+ 17.3
Leather & fabric combination	216	199	+ 8.5	17.1	15.8	+ 8.2
All leather	422	374	+ 12.8	36.2	33.6	+ 7.7
All other materials	248	286	- 13.3	3.5	4.1	- 14.6

Source: U.S. Bureau of the Census,
Current Industrial Report,
Gloves & Mittens MA-23D(83)-1.

By Leading States

The U.S. Bureau of the Census currently has available statistics on shipments of accessories by state for four segments of the accessory industry, as summarized below.

New York accounted for more than half of all shipments of non-leather belts in 1982 as well as 44.8% of platinum and karat gold jewelry and 29.6% of leather belts. Rhode Island was the largest producer of precious metal jewelry other than platinum and karat gold accounting for better than 40% of shipments of this type of accessory.

Value of Shipments of Specified Accessory Products By Leading States
1977, 1982
(Millions of dollars)

	Value of Shipments		% Change	% of Total
	1982	1977	1982/1977	1982
Jewelry made of platinum metals & karat gold				
Leading states:				
New York	$ 931.2	$ 608.2	+ 53.1%	44.8
California	184.7	81.9	+125.5	8.9
Massachusetts	138.8	105.6	+ 31.4	6.7
New Jersey	136.0	82.7	+ 64.4	6.5
Texas	122.2	63.0	+ 94.0	5.9
Leading states, total	1,512.9	941.4	+ 60.7	72.9
U.S. total	2,076.5	1,251.5	+ 66.0	100.0%

(continued)

PRODUCT SHIPMENTS

By Leading States

Value of Shipments of Specified Accessory Products By Leading States
1977, 1982
(Millions of dollars)
(continued)

	Value of Shipments 1982	Value of Shipments 1977	% Change 1982/77	% of Total 1982
Other jewelry made of precious metals				
Leading states:				
Rhode Island	$ 167.0	$ 191.0	- 12.6%	40.6
New York	74.5	51.1	+ 45.8	18.1
Massachusetts	33.7	33.5	+ 0.6	8.2
Texas	17.7	na	--	4.3
Illinois	14.0	1.8	+677.7	3.4
California	11.6	9.5	+ 22.1	2.8
Leading states, total	306.9	na	--	74.7
U.S. total	411.0	353.0	+ 16.4	100.0%
Leather belts				
Leading states:				
New York	77.6	32.2	+141.0	29.6
Texas	31.2	21.0	+ 48.6	11.9
California	28.0	10.3	+171.8	10.7
New Jersey	19.4	6.4	+203.1	7.4
Massachusetts	15.7	7.4	+112.2	6.0
Leading states, total	171.9	77.7	+121.2	65.7
U.S. total	261.5	155.5	+ 68.2	100.0
Belts other than leather				
Leading states:				
New York	99.8	37.4	+166.8	54.0
Pennsylvania	13.1	3.6	+263.8	7.0
Massachusetts	10.1	3.1	+225.8	5.5
California	8.6	3.5	+145.7	4.7
North Carolina	9.1	2.4	+279.2	4.9
Leading states, total	140.7	50.0	+181.4	76.2
U.S. total	184.7	58.2	+217.4	100.0

Source: Based on U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series

PRODUCER PRICE INDEX

Producer (factory) prices for all commodities increased 1.8% between December 1983 and November 1984 according to the U.S. Bureau of Labor Statistics. Due to lower gold and other precious metal prices, the producer price for most jewelry items recorded declines during this same period. The most noticeable decline was in the gold wedding ring category which fell 13.2%.

Producer Price Index of Specified Accessories, 1982, 1983 Average & December 1983, 1984
(December 1978 = 100 unless otherwise indicated)

	December		% Change	Annual Average		% Change
	1984	1983	1984/83	1983	1982	1983/82
All commodities (1967=100)	309.9	306.1	+ 1.2%	303.1	299.3	+ 1.3%
Jewelry, platinum & karat gold	174.7	184.4	- 5.3	191.1	174.4	+ 9.6
Rings, ladies', high fashion	189.2	190.6	- 0.7	193.1	170.6	+ 13.2
Rings, wedding, gold	179.4	206.6	- 13.2	225.3	203.1	+ 10.9
Earrings, 14 karat gold	172.1	181.9	- 5.4	187.6	174.9	+ 7.3
Other precious metal jewelry	167.8	163.1	+ 2.9	164.3	164.4	- 0.1
Rings, ladies' & men's, sterling	189.6	189.6	--	189.6	191.2	- 0.8
Bracelets, ladies', gold filled	154.6	147.1	+ 5.1	149.1	148.2	+ 0.6
Costume jewelry	143.3	136.2	+ 5.2	128.9	126.4	+ 2.0
Rings, ladies', costume	118.7	111.9	+ 6.1	106.9	104.7	+ 2.1
Earrings, children's costume	128.9	115.6	+ 11.5	124.3	130.9	- 5.0
Men's dress leather gloves (1967=100)	320.6	329.5	- 2.7	328.6	332.8	- 1.3
Luggage & small leather goods (1967=100)	221.3	205.0	+ 8.0	203.7	199.0	+ 2.4
Women's & children's handbags & purses (June 1982=100)	na	105.3	--	103.3	na	--
Attache cases, non-leather (1967=100)	213.0	194.2	+ 9.7	194.2	187.1	+ 3.8

na not available

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

Imports

Imports have become a severe problem for U.S. accessory manufacturers and the inroads made by foreign manufactured goods shows no signs of abating. The import-to-new-supply ratio for luggage and personal goods has risen from 18.7% in 1974 to 50.1% in 1984. For precious metal jewelry the same ratio rose from 4.2% to 24.9% and costume jewelry went from 10.4% to 28.6% during the same period, according to the 1985 U.S. Industrial Outlook (International Trade Administration).

Industry analysts cite two major reasons for the continued growth of imports in the accessory business. The first is the strong U.S. dollar which is having devastating effects on all product categories. The second major reason is the inherent

Imports (continued)

labor intensiveness of the accessory industry. Because the largest cost in accessory production is labor, manufacturers in low-cost, developing countries are able to severely price undercut domestic manufacturers who are forced to pay higher rates for labor.

According to the U.S. Bureau of the Census nearly every measured category of accessories imported over the first 10 months of 1984 over the comparable period in 1983 rose. The only exception was watch movements, whose value of imports declined 4.6% during this period. Every other category registered increases of at least 25% ranging to a high of 226.8% for handbags, flat goods and luggage reported together.

With the exception of handbags from Italy, most U.S. accessory imports carry low price points and come mainly from the Far East.

Detailed information on imports and exports of specified types of accessories as compiled in U.S. Census Bureau data are reported on the following tables.

Summary of U.S. Imports of Specified Accessories,
January-September 1983, 1984
(Quantity in thousands of units, unless otherwise indicated)

	Quantity			C.I.F. Value (Mil. $)		
	Jan. - Sept.		% Change	Jan. - Sept.		% Change
	1984	1983	1984/83	1984	1983	1984/83
Jewelry & religious articles, total	nr	nr	--	$984.2	$671.9	+ 46.5%
Watches & watchcases, total	34,465.1	27,231.0	+ 26.9%	516.3	387.0	+ 33.4
Watch movements, total	4,001.0	4,217.1	- 5.1	29.2	30.6	- 4.6
Watch bracelets, total	21,617.4	19,205.2	+ 12.6	36.1	28.2	+ 28.0
Handbags, reported separately, total	153,019.0	130,946.1	+ 16.9	467.9	361.9	+ 29.3
Handbags & luggage, reported together, total	4,637.5	3,050.1	+ 52.0	26.8	13.2	+103.0
Handbags, flat goods & luggage reported together, total	nr	nr	--	18.3	5.6	+226.8
Luggage, reported separately, total	nr	nr	--	514.0	303.4	+ 69.4
Flat goods, reported separately, total	nr	nr	--	113.5	80.6	+ 40.8
Gloves & glove linings, total (thous. doz. pairs)	26,240.9	19,040.9	+ 37.8	196.3	140.3	+ 39.9
Gloves, horse or cowhide	5,795.1	4,036.7	+ 43.6	86.0	56.5	+ 52.2
Gloves, of leather, nspf	563.4	413.6	+ 36.2	20.3	15.7	+ 29.3
Other gloves & glove linings	19,882.4	14,590.6	+ 36.3	90.0	68.1	+ 32.2

(continued)

FOREIGN TRADE

Imports

Summary of U.S. Imports of Specified Accessories,
January - September 1983, 1984
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity			C.I.F. Value (Mil. $)		
	Jan. - Sept.		% Change	Jan. - Sept.		% Change
	1984	1983	1984/83	1984	1983	1984/83
Mufflers, scarves & shawls, etc.	nr	nr	--	$ 43.3	$ 24.6	+ 76.0%
Handkerchiefs, total (thous. doz.)	3,159.9	2,755.0	+ 14.7%	10.5	8.4	+ 25.0
Headwear, total	nr	nr	--	149.4	105.1	+ 42.2
Leather belts	nr	nr	--	57.0	37.0	+ 54.1
Umbrellas	42,980.2	31,988.9	+ 34.4	78.2	54.0	+ 44.8

nr not reported
nspf not specially provided for
* The C.I.F. value is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census,
U.S. General Imports FT 135,
September 1983, 1984

U.S. Imports of Specified Accessories, 1982, 1983
(Quantity in thousands of units, unless otherwise indicated)

	Quantity		% Change	C.I.F. Value* (Mil. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Jewelry & religious articles, total	nr	nr	--	$1,067.9	$1,027.2	+ 4.0%
Nonprecious metal jewelry	nr	nr	--	172.4	143.0	+20.6
Precious metal jewelry, set or unset	nr	nr	--	793.2	800.8	- 0.9
Precious stones & pearls	nr	nr	--	102.3	83.4	+22.7
Watches & watchcases, total	35,916.3	98,233.9	- 63.4%	514.6	721.5	-28.7
Not over 7 jewels	31,038.1	91,931.9	- 66.2	429.5	622.0	-30.9
8-17 jewels	1,619.0	1,951.1	- 17.0	40.9	57.9	-29.4
Over 17 jewels	100.1	82.9	+ 20.7	32.0	27.3	+17.2
Watchcases	3,159.1	4,267.4	- 26.0	12.2	14.3	-14.7

(continued)

Imports

U.S. Imports of Specified Accessories, 1982, 1983
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity		% Change	C.I.F. Value* (Mil. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Watch movements, total	4,688.5	11,327.4	- 58.6%	$ 36.8	$ 56.4	- 34.8%
Not over 1 jewel	2,510.0	9,086.7	- 72.4	13.0	31.2	- 58.3
2-7 jewels	2,455.2	2,055.4	+ 19.5	22.7	22.8	- 0.4
8-15 jewels	22.7	17.4	+ 30.5	0.1	0.4	- 75.0
16-17 jewels	57.7	139.7	- 58.7	0.9	1.4	- 35.7
Over 17 jewels	2.9	28.2	- 89.7	0.1	0.6	- 83.3
Watch bracelets of nonprecious materials, total (thous. doz.)	2,018.6	3,688.5	- 45.3	37.0	45.6	- 18.9
Handbags (separately reported)	181,656.0	162,162.4	+ 12.0	507.0	441.1	+ 14.9
Nonreptile leather	28,082.4	20,201.3	+ 39.0	213.9	169.7	+ 26.0
Plastic, (other than reinforced or laminated plastic), nspf	69,412.6	49,470.1	+ 40.3	142.4	108.9	+ 30.8
Textile material, nspf	78,401.3	87,181.5	- 10.1	140.1	153.1	- 8.5
Beads, imitation gemstones, etc.	848.1	810.8	+ 4.6	2.3	1.7	+ 35.3
Paper yarns	40.9	21.7	+ 88.5	0.2	0.1	+100.0
Materials, nspf	4,870.7	4,477.0	+ 8.8	8.1	7.6	+ 6.6
Handbags & luggage (reported together), total	4,057.2	5,152.9	- 21.3	18.4	18.2	+ 1.1
Reptile leather	250.3	100.9	+148.1	6.3	4.0	+ 57.5
Willow & similar unspun fibrous vegetable fibers	3,806.9	5,052.0	- 24.6	12.1	14.2	- 14.8
Handbags, flat goods & luggage (reported together), total	nr	nr	--	8.2	6.9	+ 18.8
Reinforced or laminated plastic (thous. pounds)	555.6	404.6	- 37.3	1.7	1.4	+ 21.4
Textile material, in part braid or handloomed	nr	nr	--	6.5	5.5	+ 18.2
Luggage (separately reported), total	nr	nr	--	442.5	367.6	- 20.4
Nonreptile leather	nr	nr	--	58.3	38.6	+ 51.0
Textile material, nspf	nr	nr	--	235.2	164.4	+ 43.1
Materials, nspf	nr	nr	--	149.0	164.6	- 9.5
Flat goods (billfolds, key cases, etc.) (separately reported), total	nr	nr	--	$ 116.2	$ 99.9	+ 16.3
Leather, nspf	nr	nr	--	60.5	49.0	+ 23.5
Textile materials, nspf	nr	nr	--	30.4	30.6	- 0.7
Materials, nspf	nr	nr	--	25.3	20.3	+ 24.6

(continued)

Imports

U.S. Imports of Specified Accessories, 1982, 1983
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity		% Change	C.I.F. Value* (Mil. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Gloves & glove linings, total	25,680.2	23,015.7	+ 11.6%	$195.5	$180.8	+ 8.1%
Gloves, horse or cowhide, total (thous. dozen pairs)	5,520.2	4,781.6	+ 15.4	80.1	76.9	+ 4.2
All leather	1,859.2	1,513.2	+ 22.9	38.7	35.8	+ 8.1
Not wholly leather	3,661.0	3,268.4	+ 12.0	41.4	41.1	+ 0.7
Gloves, of leather, nspf, total (thous. dozen pairs)	601.4	316.1	+ 90.3	23.1	17.7	+ 30.5
Men's	378.5	149.9	+152.5	8.9	6.4	+ 39.1
Lined	190.0	79.0	+140.5	5.2	3.9	+ 33.3
Not lined	188.5	70.9	+165.9	3.7	2.5	+ 48.0
Women's or children's	222.9	166.2	+ 34.1	14.2	11.3	+ 25.7
Lined	200.8	145.7	+ 37.8	13.0	10.4	+ 25.0
Not lined	22.1	20.5	+ 7.8	1.2	0.9	+ 33.3
Other gloves & glove linings, (thous. dozen pairs)	19,558.6	17,918.0	+ 9.2	92.3	86.2	+ 7.1
Knit	9,887.6	8,593.5	+ 15.1	32.5	28.7	+ 13.2
Cotton	7,068.8	6,777.1	+ 4.3	18.5	17.6	+ 5.1
Textile materials, nspf	291.7	240.1	+ 21.5	6.5	6.3	+ 3.2
Man-made fibers	2,527.1	1,576.3	+ 60.3	7.7	4.8	+ 60.4
Not knit	9,671.0	9,324.5	+ 3.7	59.6	57.5	+ 3.7
Man-made fibers	3,010.8	2,188.9	+ 37.5	34.7	29.6	+ 17.2
Other textile materials	6,660.2	7,135.6	- 6.7	24.9	27.9	+ 10.8
Mufflers, scarves & shawls, etc., not knit, total	na	na	--	37.2	25.4	+ 46.5
Cotton	859.9	585.7	+ 46.8	1.6	1.0	+ 60.0
Vegetable fibers, not cotton	4.8	1.4	+242.9	**	**	--
Wool	2,382.6	1,588.4	+ 50.0	8.7	5.8	+ 50.0
Silk, not ornamented	5,834.6	2,773.5	+110.4	14.8	9.6	+ 54.2
Man-made fibers	15,050.2	9,915.7	+ 51.8	11.1	8.4	+ 32.1
Textile materials (thous. pounds)	216.5	146.6	+ 47.7	1.0	0.6	+ 66.7
Handkerchiefs, total (thous. doz.)	4,161.2	3,596.8	+ 15.7	12.2	12.3	- 0.8
Cotton	3,510.4	3,048.2	+ 15.2	8.4	8.2	+ 2.4
Silk	139.6	136.4	+ 2.3	2.1	2.2	- 4.5
Vegetable fibers, not cotton	75.3	79.7	- 5.5	0.5	0.6	- 16.7
Textile materials	435.9	332.5	+ 31.1	1.2	1.3	- 7.7
Headwear, total	nr	nr	--	138.2	125.8	+ 9.9
Vegetable material, paper & man-made fibers, nspf	nr	nr	--	47.9	47.1	+ 1.7
Wool, except felt	3,922.5	2,610.8	+ 50.2	10.7	7.4	+ 44.6
Textile material, except wool, nspf	nr	nr	--	51.7	48.1	+ 7.5

(continued)

Imports

U.S. Imports of Specified Accessories, 1982, 1983
(Quantity in thousands of units, unless otherwise indicated)
(continued)

Headwear (continued)	Quantity 1983	Quantity 1982	% Change 1983/82	C.I.F. Value* (Mil. $) 1983	C.I.F. Value* (Mil. $) 1982	% Change 1983/82
Fur not on the skin, men's & boys'	193.2	161.7	+ 19.5%	$ 1.8	$ 2.1	- 14.3%
Felt & fur not on the skin	nr	nr	--	1.7	1.2	+ 41.7
Headband & reinforced plastic headwear or hardhats, nspf	nr	nr	--	24.4	20.3	+ 20.2
Leather belts, total	nr	nr	--	52.4	36.7	+ 42.8
Umbrellas	46,627.7	nr	--	78.3	nr	--

na not available
nr not reported
nspf not specially provided for
* The C.I.F. value is based on the purchase price as well as all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.
** Less than $0.1 million

Source: U.S. Bureau of the Census,
U.S. General Imports, FT 135,
December 1983, 1982

Exports

No overall category of accessories managed to record a gain in its value of exports between 1982 and 1983, while two groups, handkerchiefs and gloves remain even.

The largest declines during the period were recorded by umbrellas and handbags, off 44.4% and 38.0%, respectively.

Exports

U.S. Exports of Specified Accessories, 1982, 1983
(Quantity in thousands of units, unless otherwise indicated)

	Quantity		% Change	Value (Mil. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Jewelry, total	nr	nr	--	$177.7	$180.8	- 1.7%
Not precious or semiprecious	nr	nr	--	55.0	61.1	- 10.0
Platinum or gold, set or unset	nr	nr	--	34.2	31.0	+ 10.3
Rolled precious metal or sterling silver, set or unset	nr	nr	--	13.5	13.5	--
Precious stones or natural pearls	nr	nr	--	69.3	69.7	- 0.6
Cultured pearls or semiprecious stones	nr	nr	--	5.7	5.5	+ 3.6
Watches, watchcases & watch movements, total	nr	nr	--	33.7	51.5	- 34.6
Watches	692.1	919.0	- 24.7%	9.6	16.1	- 40.4
Watch movements	269.3	1,160.7	- 76.8	1.3	3.7	- 64.9
Watch cases & parts thereof	nr	nr	--	22.8	31.7	- 28.1
Handbags, total	4,635.2	6,320.4	- 26.7	9.3	15.0	- 38.0
Leather	191.3	273.4	- 30.0	2.4	3.1	- 22.6
Plastics	3,825.7	5,058.0	- 24.4	1.8	4.2	- 57.1
All other materials	618.2	989.0	- 37.5	5.1	7.7	- 33.8
Flat goods (billfolds, key cases, etc.), total	nr	nr	--	5.6	6.7	- 16.4
Leather	nr	nr	--	1.2	1.9	- 36.8
Non-leather	nr	nr	--	4.4	4.8	- 8.3
Luggage, total	nr	nr	--	32.5	39.0	- 16.7
Handkerchiefs, total (thous. doz.)	122.8	244.0	- 49.7	0.5	0.5	--
Cotton	92.7	175.1	- 47.1	0.4	0.1	+300.0
Man-made fibers	21.2	46.5	- 54.4	0.1	0.3	- 66.7
All other textile fibers	8.9	22.4	- 60.3	**	0.1	--
Mufflers, scarves & shawls (thous. doz.)	37.6	52.8	- 28.8	0.4	0.6	- 33.3
Gloves & glove linings (thous. doz.), total	2,508.1	2,352.4	+ 6.6	26.8	26.8	--
Cotton	865.2	555.2	+ 55.8	5.4	3.9	+ 38.5
Wool	3.4	11.1	- 69.4	**	0.1	--
Man-made fibers	176.2	140.3	+ 25.6	2.0	1.6	+ 25.0
All other textile materials	489.6	467.7	+ 4.7	4.5	4.5	--
Leather or of fur on the skin	439.0	641.8	- 31.6	8.6	9.4	- 8.5
Material, nspf	534.7	536.3	- 0.3	6.3	7.3	- 13.7

(continued)

FOREIGN TRADE

Exports

U.S. Exports of Specified Accessories, 1982, 1983
(Quantity in thousands of units, unless otherwise indicated)
(continued)

	Quantity		% Change	Value* (Mil. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Leather belts, total	nr	nr	--	$ 4.2	$ 5.4	- 22.2%
Headwear, total (thous. doz.)	1,593.4	1,691.2	- 5.8%	21.7	$ 24.4	- 11.1
Reinforced or laminated plastics	334.0	522.3	- 36.1	4.7	6.7	- 29.9
Rubber or plastic, except reinforced or laminated plastics	329.4	197.0	+ 67.2	3.0	3.7	- 18.9
Other headwear, except rubber or plastic	929.8	971.9	- 4.3	14.0	14.0	--
Umbrellas	108.9	106.1	+ 2.6	1.0	1.8	- 44.4

nr not reported
nspf not specified by kind
* The export value is generally equivalent to a f.a.s. (free alongside ship) value at the U.S. port of export, based on the transaction price, including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation.
**Less than $0.1 million.

Source: U.S. Bureau of the Census,
U.S. Exports FT 446,
December 1982, 1983.

AT THE RETAIL LEVEL

THE SIZE OF THE POTENTIAL MARKET

Population Projections - 1984, 1994, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Male							
Total, all ages	115,073	125,464	134,297	+ 16.7%	100.0%	100.0%	100.0%
Under 5 years	9,329	9,635	8,931	- 4.3	8.1	7.7	6.6
5 to 9 years	8,296	9,866	9,094	+ 9.6	7.2	7.9	6.8
10 to 15 years	10,708	11,245	11,698	+ 9.2	9.3	9.0	8.7
16 years & over	86,742	94,718	104,574	+ 20.5	75.4	75.4	77.9

(continued)

Population Projections - 1984, 1994, 2005
(Middle Series*)
(continued)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Male (continued)							
16 - 19	7,653	6,712	8,058	+ 5.3%	6.6%	5.3%	6.0%
20 - 34	31,522	29,725	27,416	- 13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+ 56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+ 35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+ 27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+ 20.4	--	--	--
Female							
Total, all ages	121,343	132,251	141,381	+ 16.5	100.0	100.0	100.0
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.9
16 years & over	94,279	102,903	113,018	+ 19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	- 14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+ 52.1	22.3	27.4	29.2
55 - 64	11,834	11,002	15,399	+ 30.1	9.8	8.3	10.9
65 & over	16,768	20,205	21,957	+ 30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+ 21.0	--	--	--
Total, male & female							
Total, all ages	236,416	257,714	275,677	+ 16.6	100.0	100.0	100.0
Under 5 years	18,232	18,823	17,449	- 4.3	7.7	7.3	6.3
5 to 9 years	16,219	19,281	17,772	+ 9.6	6.9	7.5	6.5
10 to 15 years	20,944	21,991	22,865	+ 9.2	8.9	8.5	8.3
16 years & over	181,021	197,619	217,591	+ 20.2	76.5	76.7	78.9
16 - 19	15,009	13,138	15,765	+ 5.0	6.3	5.1	5.7
20 - 34	62,726	58,792	54,122	- 13.7	26.5	22.8	19.6
35 - 54	53,090	71,389	82,018	+ 54.5	22.4	27.7	29.7
55 - 64	22,210	20,793	29,459	+ 32.6	9.4	8.1	10.7
65 & over	27,986	33,507	36,227	+ 29.4	11.8	13.0	13.1
Median age (years)	31.1	34.3	37.6	+ 20.9	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 952 (May 1984)

THE SIZE OF THE POTENTIAL MAREKT

The two fastest growing segments of the population between 1984 and 2005 according to projections by the Census Bureau will be the 35 - 54 year olds (+54.5%) and the 55 - 64 year olds (+32.6%). This compares with an expected growth rate for the population over 16 years old of 20.2% during the same period.

With a sizeable portion of the postwar baby boom moving into higher earnings brackets and purchasing more luxury goods, the overall outlook for accessories is bright. The trend towards smaller households and dual-income families is also expected to a be a boon to the accessory industry.

Working Women

During 1984, more than 51 million women were employed in the U.S. with 25 million of them working full-time, year round, the greatest number ever. Participation rates for women in the labor force now stand at about 66% compared to a rate for men of about 88%. However, the rate for women has been increasing steadily while that for men has remained stable and thus the gap is narrowing.

According to the Bureau of Labor Statistics, over the next 15 years, the number of men at work will increase 13% while the increase in the number of women will be more than double that rate--27%. Currently there are 18 million more women at work then there were in 1970 and twice the number as in 1960.

The influx of women into the work force is expected to aid the growth of accessories. As women move up in organizations and the "dress for success" mentality becomes more ingrained, sales of accessories will grow. Likewise the income earned by women who work increases household income and thus there is more discretionary income for items such as accessories.

The Bridal Market

In 1983, the number of marriages performed in the United States declined for the first time since 1975. According to reports from the National Center For Health Statistics, there were 2,444,000 marriages, 2% less than in 1982 yet still higher than the total for 1981. Over the first 11 months of 1984, the number of marriages in the U.S. has risen 1.3% above the comparable 1983 period.

The rising number of marriages performed has been a traditional boon for the accessories industry, particularly in the jewelry classification.

THE SIZE OF THE POTENTIAL MARKET

The Bridal Market

Monthly Patterns in Marriages, 1982, 1983, 1984

	Annual Totals (thousands)		
	1984	1983	1982
Total	2,487	2,444	2,495
January	128	132	133
February	164	143	141
March	153	162	164
April	173	185	193
May	230	231	239
June	305	289	290
July	229	228	250
August	265	272	253
September	249	236	237
October	201	195	225
November	194	188	181
December	196	183	188

* Provisional

Source: Based on U.S. Department of Health & Human Services, Monthly Vital Statistics Report, March 1984, March 1985

RETAIL SALES

Due to the various categories which constitute the accessory market and the lack of standard definitions as to what are accessories, there is very little information on the retail market for accessories as a whole.

This Fact File concentrates on specific types of fashion accessories. Other merchandise often included as accessories by retailers are covered in other Fact Files (including the Hosiery/Legwear and Men's Furnishings Fact Files).

It is currently believed that total retail sales of accessories, not including jewelry is about $9.5 billion. This would put spending for accessories at about 10% of the overall apparel level, a commonly accepted assumption.

According to Retail Merchandising Service Automation's survey of 4,500 retailers, nationwide, retail sales of men's accessories increased 1.9% in 1984. This compares quite favorably with 1.3% increase registered for men's apparel overall.

RETAIL SALES

Retail Performance of Specified Men's Wear Categories, 1984

	Total Retail Sales	Markup*	Markdowns*
Total	+ 1.3%	--	--
Swimwear & bermudas	+ 20.0	49.2%	+ 9.4%
Hats & caps	+ 11.3	50.7	- 32.4
Leather jackets	- 8.8	48.6	- 11.9
Jeans	- 6.0	46.0	- 4.5
Neckwear	+ 7.4	57.8	+ 28.3
Dress shirts	+ 7.0	51.8	- 9.3
Casual slacks	+ 6.5	50.6	- 6.4
Active sportswear	+ 6.3	49.8	+ 41.4
Jackets	+ 4.8	49.1	+ 2.7
Knit shirts	+ 4.2	48.4	+ 33.7
Underwear, pajamas & robes	+ 2.8	51.7	+ 0.7
Sport shirts	+ 2.4	50.5	+ 0.2
Hosiery	+ 2.1	51.5	+ 16.1
Accessories	+ 1.9	51.2	+ 5.5
Outerwear	+ 1.1	47.1	- 4.4
Suits	+ 0.3	49.1	+ 9.1
Sweaters	- 5.0	47.1	- 17.0
Sport coats	- 2.7	49.4	- 3.5
Dress slacks	- 1.5	50.5	+ 1.0

* January - November

Figures were compiled from the sales of about 4,500 retailers, about 1,800 of which carry men's wear only.

Source: Retail Merchandising Service Automation, Daily News Record (1-28-85)

Personal consumption expenditures for all types of men's & women's jewelry and watches reached $12.8 billion in 1983, an increase of 6.8% over 1982 and 5.4% above 1981.

Personal Consumption Expenditures for Jewelry & Watches, 1981-1983
(Millions of $)

	1983	1982	1981	% Change 1983/1982	% Change 1983/1981
Jewelry & watches, total	$12,833	$12,015	$12,172	+ 6.8%	+ 5.4%

Source: Department of Commerce, Office of Business Economics.

RETAIL SALES

By Type of Retail Outlet

The latest official information on retail sales by accessory type is from the 1977 Census of Retail Trade. Results from the 1982 census are expected to be released by the Census Bureau late in 1985. Not all store types broke out sales in detail, but the following information reflects sales in major outlet types. Comparative sales figures for previous years are not available due to changes in merchandise classifications.

Sales of men's accessories reported by leading outlet types amounted to a total of $1.2 billion in 1977. Department stores accounted for $704.4 million, or 59.3% of this total.

Reported Sales of Men's Accessories by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Men's accessories (hats, gloves, belts, wallets, umbrellas, etc.)	36,426	100.0%	$1,187.0	100.0%
Department stores**	7,244	19.9	704.4	59.3
Men's wear stores	14,696	40.3	307.4	25.9
Family clothing stores	10,246	28.1	135.9	11.5
Other (women's ready-to-wear stores, men's shoe stores & mail order houses)	4,240	11.6	39.3	3.3

* Each business location is separately counted as a store unit, including each unit in a multi-unit organization.

**Includes discount department stores as well as traditional department stores. Sales of catalog order desks within these stores are included in the department store data, but not sales of catalog headquarters operations, which are included in mail order house data.

Percent of Total Men's & Boys' Wear Sales Accounted For By Men's Accessories Sales in Key Store Types, 1977

	Total Men's & Boys' Wear Sales* (Mil. $)	% of Total Accounted For By Men's Accessories
Department stores**	$ 10,574.9	6.7%
Men's wear stores	6,275.4	4.9
Family clothing stores	3,001.5	4.5

* Excludes men's & boys' footwear sales
**See footnote for the preceding table

Source for both tables: U.S. Bureau of the Census, Census of Retail Trade, 1977, Merchandise Line Sales RC77-L.

RETAIL SALES

By Type of Retail Outlet

As previously mentioned, the 1977 Census of Retail Trade remains the latest available source of information on retail sales of accessories by store type.

In 1977, department stores were the dominant retailers of accessories accounting for 56.1% of handbags and leather goods, 67.6% of hats, hairpieces and trimmings and 54.8% of other accessory items. Women's ready-to-wear stores were in second position in every measured women's accessory category.

It must be noted, however, that the accessory categories summarized below are also sold in other outlet types for which no break out is available.

Reported Sales of Specified Women's Accessories by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Women's handbags & small leather (and plastic) goods	46,765	100.0%	$1,190.5	100.0%
Department stores**	7,727	16.5	667.9	56.1
Women's ready-to-wear stores***	18,311	39.2	234.3	19.7
Family clothing stores	8,972	19.2	96.2	8.1
Shoe stores	8,450	18.1	126.5	10.6
Mail order houses	3,305	7.1	65.6	5.5
Women's accessories (gloves, neckwear, belts, umbrellas, etc.)	40,585	100.0%	977.5	100.0
Department stores**	7,120	17.5	536.0	54.8
Women's ready-to-wear stores***	20,657	50.9	306.4	31.4
Family clothing stores	8,848	21.8	103.0	10.5
Other stores (men's wear stores, shoe stores & children's wear stores)	938	2.3	12.9	1.1
Mail order houses	3,022	7.5	19.2	2.0
Women's hats, trimmings, etc.	12,982	100.0	253.0	100.0
Department stores**	5,557	42.8	171.1	67.6
Women's ready-to-wear stores***	4,524	34.8	40.8	16.1
Millinery stores	256	2.0	20.5	8.1
Family clothing stores	2,299	17.7	14.4	5.7
Mail order houses	346	2.7	6.2	2.5

* and ** See footnotes on table of men's accessories sales.
***Does not include sales in women's accessory and specialty stores (handbag stores, glove stores, etc.) Sales in these stores totaled $494.5 million in 1977, in 2,937 outlets with payrolls.

RETAIL SALES

By Type of Retail Outlet

Percent of Total Women's & Children's Wear Sales Accounted For By Sales of Specified Accessories in Key Store Types, 1977

	Total Women's & Children's Wear Sales* (Mil. $)	% Accounted For By: Handbags, Small Leather Goods	Hats, Hair-pieces	Accessories (gloves, belts, etc.)
Department stores**	$ 16,250.7	0.9%	0.2%	0.7%
Women's ready-to-wear stores***	11,066.5	1.9	0.3	2.5
Family clothing stores	3,471.6	1.2	0.2	1.3

* Excludes women's and children's footwear sales.
** See footnote on table of men's accessories sales, page 33.
***Does not include sales in women's accessory and specialty stores.

Source for preceding two tables: Based on U.S. Bureau of the Census, Census of Retail Trade, 1977, Merchandise Line Sales RC77-L.

Men's & women's jewelry sales in 1977 in major store types were reported at $8.15 billion according to the census of retail trade. In this report, jewelry sales include both precious metal and costume jewelry as well as watches. As previously noted not all store types broke out sales in detail, therefore sales of jewelry in supermarkets and other type stores are not included in the table below.

Reported Sales of Jewelry by Store Type, 1977
(Includes only stores with payrolls)

	Stores Reporting Sales		Sales	
	Number*	% of Total	Mil. $	% of Total
Jewelry	110,575	100.0%	$8,150.8	100.0%
Department stores**	8,355	7.6	1,753.9	21.5
Women's wear stores	9,546	8.6	156.2	1.9
General merchandise stores (except variety & department)	7,107	6.4	675.9	8.3
Jewelry stores & miscellaneous stores	27,828	25.2	4,465.0	54.7
All other store types	53,779	48.6	739.3	9.1
Non-store retailers (mail order houses & direct selling)	3,960	3.6	360.5	4.4

** See footnotes on table of men's accessories sales, page 33.

RETAIL SALES

By Type of Retail Outlet

Percent of Total Store Sales Accounted for by Jewelry Sales
In Key Store Types, 1977, 1982(p)

	1977		1982(p)	
	Total Store Sales (Mil. $)	% of Total Accounted For By Jewelry	Total Store Sales (Mil. $)	% of Total Accounted For By Jewelry
Department stores**	$76,909.4	2.3%	$107,082.6	2.1%
Women's wear stores	13,163.8	1.1	20,310.8	na
General merchandise stores (except variety & department stores)	9,597.7	7.0	na	na
Jewelry stores	5,010.5	85.6	8,261.7	87.1

** See footnote on table of men's accessories sales, page 33.

Source for preceding two tables: U.S. Bureau of the Census, Census of Retail Trade, 1977, Merchandise Line Sales RC77-L.

Merchandising and operating results in three major store types selling accessories are reported below. Data on the total number of stores in 1982 and their total sales of all merchandise in recent years are also shown.

Trends in Total Sales in Major Apparel Store Types, 1982-1984

	Number of Stores	Sales	
		Mil. $	% Change From Previous Year
Department stores			
1984	na	129,284	+ 10.9%
1983	na	116,562	+ 8.8
1982	9,767	107,163	+ 3.5
Men's & boys' wear stores			
1984	na	8,432	+ 5.9
1983	na	7,962	+ 3.5
1982	17,102	7,694	- 1.3
Women's ready-to-wear stores			
1984	na	25,759	+ 14.2
1983	na	22,550	+ 11.3
1982	42,419	20,262	+ 8.4

na not available

Source: U.S. Bureau of the Census, Revised Monthly Retail Sales BR-13-85

RETAIL OPERATING RATIOS

Department Stores

Six out of the eight accessory categories measured by the National Retail Merchants Association registered double-digit increases in sales in department stores in 1983. Only the small leather goods group and the fine jewelry and watch category did not have such gains climbing 8.0% and 6.0%, respectively.

Fine jewelry and watches marked the highest sales per square foot at $445 while luggage had the second position with $429.

Merchandising & Operating Results of Specified Accessories
In Department Stores With Total Sales Over $1 Million, 1983
(Median Results)

	Women's Accessories			
	Fine Jewelry/ Watches (28)#	Costume Jewelry (78)#	Gloves (65)#	Handbags (59)#
Net sales, % change from last year	+ 6.0	+ 16.3	+ 19.5	+ 10.4
Sales, % to total store sales	1.5	1.8	0.7	1.5
Net sales, % of merchandise division***	11.7	15.9	5.1	12.1
$ sales per square foot of selling space (main or largest selling unit)	$445.0	$308.7	$252.1	$145.8
Gross margin, % of sales	43.6%	49.8%	49.7%	48.9%
Number of stock turns (times)	1.4	3.0	4.2	3.5

	Women's Accessories			
	Small Leather Goods (55)#	Misc. Apparel Accessories* (84)#	Men's Accessories** (38)#	Luggage (80)#
Net sales, % change from last year	+ 8.0%	+ 11.8%	+ 22.5%	+ 11.9%
Sales, % to total store sales	0.3	0.9	1.5	0.6
Net sales, % of merchandise division***	2.8	6.9	11.2	18.6
$ sales per square foot of selling space (main or largest selling unit)	$245.0	$185.2	$429.3	$ 97.0
Gross margin, % of sales	48.3%	50.5%	53.3	43.6
Number of stock turns (times)	3.1	3.1	3.4	1.9

* Women's miscellaneous apparel accessories include neckwear, scarves, handkerchiefs, umbrellas, folded rain accessories and belts.

** Men's accessories include ties, handkerchiefs, jewelry, small leather goods, gloves, mufflers, toiletries & umbrellas

*** For women's accessories, the merchandise division is adult female intimate apparel and accessories; for men's accessories, adult male apparel; for luggage, hobby, recreation & transportation.

Number in parentheses refers to the number of reporting firms in each category.

Source: National Retail Merchants Association
"Merchandising & Operating Results of 1984"

RETAIL OPERATING RATIOS

Women's Specialty Stores

The only measured accessory category to register a decline in women's specialty stores in 1983 was fine jewelry and watches according to the NRMA. Handbags and small leather goods were up 5.9% while gloves rose 10.2% and costume jewelry was up 19.5% compared with an increase of 9.0% for the total upstairs store.

Merchandising & Operating Results of Specified Accessories In Women's Specialty Stores With Total Sales Over $1 Million, 1983

		Women's Accessories				
	Total Upstairs Store (35)**	Fine Jewelry & Watches (9)**	Handbags & Small Leather Goods (19)**	Gloves (12)**	Misc. Apparel Accessories* (24)**	Costume Jewelry (19)**
Net sales, % change from last year	+ 9.0%	- 7.6%	+ 5.9%	+ 10.2%	+ 19.7%	+ 19.5%
Sales, % to total store sales	100.0	0.9	2.7	1.0	2.4	2.2
Net sales, % of merchandise division#	--	5.4	19.2	5.9	13.4	13.1
$ sales per square foot of selling space (main or largest selling unit)	$163.1	nr	$201.8	$251.1	$262.0	$241.5
Gross margin, % of sales	43.6	43.4	45.0	45.5	49.2	47.8
Number of stock turns (times)	3.1	2.2	3.6	3.6	3.8	2.8

* Women's miscellaneous apparel accessories include neckwear, scarves, handkerchiefs, umbrellas, folded rain accessories and belts.
** Number in parentheses refers to the number of reporting firms in each category.
# For women's accessories, the merchandise division is adult female intimate apparel and accessories.

Source: National Retail Merchants Association
"Merchandising & Operating Results of 1984"

Men's Wear Stores

Whole sales in men's wear stores surveyed by the Menswear Retailers Association of America rose 5.5% in 1983, accessory sales moved up only 4.5% from 1982 levels. Men's belts turned in an even poorer performance rising only 2.0% in this store type.

RETAIL OPERATING RATIOS

Men's Wear Stores

Merchandising & Operating Results of Men's Accessories
In Men's Wear Stores, 1983

	Total Store	Men's Accessories	Men's Belts
% change in sales from last year (66)*	+ 5.5%	+ 4.5%	+ 2.0%
% to total store sales (92)*	100.0	2.3	0.9
% to total sales in merchandise division** (90)*	--	12.6	5.0
% distribution of average inventory within merchandise division** (38)*	--	16.9	6.1
Number of stock turns (times) 38)*	1.9	1.5	1.7
Markdowns, % of sales (57)*	15.0	6.3	4.2

* Number in parentheses refers to the number of reporting firms in each category.
**Merchandise division for accessories and belts is men's furnishings.

Source: Menswear Retailers of America
1983 Annual Business Survey

RETAIL SALES BY MONTH

In a typical month, sales of women's handbags and small leather goods in department stores account for 4.1% of women's apparel and accessories sales. Three of the four specified accessory items hit their sales peak, as a percentage of total departmental sales, in December--handbags and small leather goods (5.9%), women's and children's gloves (3.6%) and women's and misses' neckwear and scarves (3.6%). The exception is millinery, which accounts for its highest portion of apparel and accessory sales in March (3.7%).

Percent of Total Women's Apparel & Accessories Sales in Department Stores
Accounted For by Specified Accessories, by Month

	Handbags & Small Leather Goods	Millinery	Women's & Children's Gloves	Women's & Misses' Neckwear & Scarves
January	3.0%	2.0%	1.9%	2.2%
February	3.6	2.4	1.6	2.6
March	3.8	3.7	1.8	2.4
April	4.0	3.2	1.8	2.6
May	4.5	1.8	1.4	2.7
June	4.1	1.5	1.1	3.0
July	3.6	1.4	0.9	2.7
August	3.2	1.9	1.0	2.3
September	4.0	3.0	1.5	2.6
October	3.8	2.9	2.4	2.9
November	4.3	2.3	2.8	2.8
December	5.9	1.5	3.6	3.6
5 year average	4.1	2.2	2.0	2.8

Source: Newspaper Advertising Bureau, based on Federal Reserve Board data (1961-1965), latest available figures.

RETAIL ADVERTISING

Percent of 1983 Newspaper Advertising Linage of Specified Accessories Used Each Month

	Fine Jewelry	Handbags	Luggage
Total linage	100.0%	100.0%	100.0%
January	4.2	4.5	4.4
February	6.9	6.1	5.3
March	6.0	9.8	6.3
April	7.7	8.1	5.5
May	11.5	11.4	20.4
June	7.4	3.6	10.4
July	4.0	5.4	4.2
August	6.3	8.4	8.1
September	6.3	8.7	5.6
October	8.0	9.8	5.5
November	13.4	11.8	11.6
December	18.3	12.4	12.7

Source: The Advertising Checking Bureau, Inc. Neustadt Reports Div., covering retail newspapers in seven cities - Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles & Washington.

CONSUMER BUYING HABITS

The following tables on specified accessories items have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. They are based on the findings from an ongoing monthly panel diary tracking the purchases of 6,500 nationally representative families.

Purchases of Specified Men's Accessories by Store Type
(Percentages of units sold)

	Belts		Wallets	
	1983	1982	1983	1982
Department Stores	28.5%	30.2%	34.7%	37.2%
Discounters	24.5	21.2	20.1	18.5
Specialty stores	20.5	20.7	3.2	13.7
Mass merchandisers (Sears, Penney, Ward)	13.7	17.5	25.1	10.5
Mail order	2.4	1.1	2.9	5.4
All other	10.4	9.2	14.1	14.8

Purchases of Specified Men's Accessories by Price Point
(Percentages of units sold)

	Belts		Wallets	
	1983	1982	1983	1982
Less than $3.00	6.3%	11.1%	4.9%	5.5%
$3.00 - $4.99	12.0	14.8	11.8	8.7
$5.00 - $6.99	20.5	21.3	17.7	13.7
$7.00 - $8.99	16.5	11.5	17.7	21.3
$9.00 - $10.99	13.8	11.7	15.4	21.2
$11.00 - $12.99	12.9	11.7	10.1	8.8
$13.00 - $14.99	6.0	5.9	3.7	6.3
$15.00 - $19.99	8.1	7.6	13.5	10.7
$20.00 - $24.99	2.2	3.3	3.3	4.0
$25.00 or more	1.7	1.1	1.9	--

Source: NPD Research

In May 1984, 999 teenage girls, members of Seventeen Magazine's 2,000 member Consumer Panel, which represents a cross-section of teens nationwide, answered the magazines Spring Apparel Study on the apparel and accessory items they purchased during the preceding year. This information was then projected to the entire female teenage market to get estimates of the total amount spent on accessories, the number purchased and the number purchasing them.

The survey revealed that in 1983, teenage girls spent a total of $13.2 billion for their wardrobes of which accessories accounted for a total of $1.5 billion.

Purchases of Specified Accessories by Teenage Girls

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Jewelry			
Necklaces	11,481	17,337	$ 165,222
Pins	6,269	10,783	75,697
Earrings	3,573	15,646	156,147
Bracelets	3,573	7,469	77,304
Watches	2,343	2,788	184,761
Belts			
Leather	5,661	10,700	143,808
Suede	102	115	1,738
Other	7,347	13,590	87,112

(continued)

Purchases of Specified Accessories by Teenage Girls
(continued)

	Number Purchasing (000)	Number Purchased (000)	Total Expenditures (000)
Scarves			
Cotton	1,712	2,911	$ 20,348
Silk	1,101	1,619	18,813
Woven	448	599	4,798
Knit	257	380	2,181
Gloves			
Knit	1,805	2,040	18,360
Leather	269	312	5,756
Hats			
Knit	1,088	1,654	24,376
Felt	395	395	19,005
Handbags	7,995	16,392	275,058
Wallets/billfolds/keycases	2,982	5,011	62,938
Sunglasses	5,405	7,241	130,628
Umbrellas	1,514	2,210	24,376
Total girls buying accessories	12,273	119,192	1,478,802

Source: Seventeen Magazine,
1984 Spring Apparel Study

Luggage

In 1984, Leo J. Shapiro Associates conducted a survey for Travelware magazine to determine consumers luggage buying attitudes and intentions, and followed a similar survey conducted by the same organization two years earlier.

In the most recent study, it was found that 10% of the households polled had purchased luggage in the previous twelve months while another 3% stated they intended to purchase in the next twelve months.

Outlet Where Luggage Was Bought

	Apr. '83--Apr. '84	Apr. '81--Apr.'83
Discount department store	10.3%	21.5%
Mass merchandiser	28.3	20.1
Department stores	16.6	31.0
Catalog showroom	13.1	6.9
Specialty store	19.3	9.1
Other	12.4	11.4

(continued)

CONSUMER BUYING HABITS

Luggage

Reason for Selecting Outlet Type
(Apr. '84--Apr. '85)

	Percent
Price/Discount	30.5%
Quality	10.1
Selection	8.9
Location/convenience	8.4
Have account/credit	7.4
Past experience	6.3
Other	2.7
No answer	25.7

Price Paid/Expected to Pay

	Apr. '84--Apr. '85	Apr. '82--Apr. '83
$ 19 - $ 35	6.6%	7.3%
$ 36 - $ 50	9.7	10.5
$ 51 - $ 99	13.7	13.1
$100 - $149	11.7	15.5
$150 - $199	11.4	4.8
$200 - $299	7.6	8.1
$300 - $399	7.8	6.4
$400 - $499	2.3	2.7
$500 - $699	3.2	0.3
$700 & over	1.3	1.1
No Answer	24.7	30.2

Source: Travelware Magazine,
November, 1984

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now -- 1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Stores and National/Regional Chains): Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now -- 1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FOOTWEAR (MEN'S, WOMEN'S, BOYS' AND GIRLS'): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics. (1984 Edition available now -- 1985 Edition will be available in September)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season. (July)

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRICAL HOUSEWARES (Including a new Consumer Buying Intention Survey): Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (October)

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., the size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet. (May)

MEN'S SPORTSWEAR CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR (Including Tailored Casual Wear): Manufacturer level profiled by production, value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations of large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Covers developments in brand name merchandising, store labels, designer labels, and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and in physical fitness. (A Fact File Special Edition)

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on the findings in the 1982 Census of Retail Trade issued by the U.S. Census Bureau in 1985. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, geographical changes, etc. (A Fact File Special Edition) (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (June)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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TABLE OF CONTENTS

MEN'S FURNISHINGS

Page

AT THE MANUFACTURER LEVEL:
- MARKET TRENDS..... 1
- GENERAL INDUSTRY STATISTICS..... 1
  - EMPLOYMENT AND EARNINGS..... 4
  - CONCENTRATION IN THE INDUSTRY..... 5
  - LOCATION OF THE INDUSTRY..... 7
- PRODUCTION..... 9
- SHIPMENTS.....13
- PRODUCER PRICES.....15
- FOREIGN TRADE--IMPORTS.....16
- FOREIGN TRADE--EXPORTS.....17

AT THE RETAIL LEVEL
- THE POTENTIAL MARKET.....19
- RETAIL SALES.....21
- RETAIL SALES BY STORE TYPE.....22
- CONSUMER PRICES.....25
- RETAIL ADVERTISING.....25
- CONSUMER BUYING HABITS.....26

MEN'S WORK WEAR

AT THE MANUFACTURER LEVEL:
- MARKET TRENDS.....30
- GENERAL INDUSTRY STATISTICS.....31
  - EMPLOYMENT AND EARNINGS.....32
- LOCATION OF THE INDUSTRY.....33
- PRODUCTION.....34
- SHIPMENTS.....37
- PRODUCER PRICES.....39

AT THE RETAIL LEVEL:
- THE POTENTIAL MARKET.....39
- RETAIL SALES.....40
- CONSUMER BUYING HABITS.....41

SCHEDULE OF ADDITIONAL FACT FILES.....42

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MEN'S FURNISHINGS

Market Trends

The gains registered by men's furnishings in 1984 are expected to continue well into 1985, according to industry analysts. The impulse among consumers to wear more traditional outfits, a trend which started in the recessionary period of the early 1980's, is still alive in 1985 and is aiding the sales of furnishings. Furnishings have always been perceived by consumers as a less expensive method of updating wardrobes, without having to purchase new suits or jackets. As the "baby boom" generation has grown up in a period of high inflation and recessions, budgeting has become a way of life and purchases of furnishings rather than suits and sports jackets has become a standard.

Color, styling and quality remain the three largest considerations among purchasers of men's furnishings. Men's dress shirts with contrasting-color collars are an example of the new color trends in the furnishings market. Likewise, fashion underwear in multitudes of colors became one of the best furnishings sellers in 1984, according to industry sources.

Imports of furnishings flooded into the United States in 1984 due to the strong dollar which made imported goods relatively cheaper, as well as the booming domestic market for most furnishings categories. The major advantage that domestic manufacturers now possess is their ability to adapt more quickly to the constantly changing trends in the furnishings market.

The term "furnishings" covers a very diversified group of products, ranging from neckwear to underwear. These products are treated in multi-industry data available from government sources in a manner which does not yield composite information. Nor perhaps, would that be meaningful because of the varying trends within segments of the product group. However, wherever possible in the following tables men's furnishings data has been extracted from broader-based industry reports.

Information on sports shirts is included in the Fact File only where data is combined with dress shirts. (For sport shirt data, see the Men's Sportswear, Casual Wear Fact File). Hosiery information is covered in the Hosiery/Legwear Fact File. Accessory items, such as jewelry and small leather goods, which are often included in retail data covering men's furnishings departments, are not covered in detail in this report but are covered in the Fashion Accessories Fact File.

Industry data as reported by the Department of Commerce and shown in the following tables include manufacturers of furnishings for both men and boys. Separate figures are available, however, on a product basis for the most part, and these are covered for men's items in this report, with boys' items included in the Fact File on boys' and girls' wear.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete census of all manufacturers in the U.S. is compiled by the U.S. Census Bureau every five years in years ending in "2" and "7". The most recent year covered is 1982. The data from the 1982 census is summarized on the table below and are compared with findings from the 1977 Census of Manufactures.

GENERAL INDUSTRY STATISTICS

For a selected group of major industry classifications, including in the furnishings area, Men's & Boys' Shirts & Nightwear (SIC 2321), the International Trade Association, U.S. Department of Commerce has published estimates on manufacturing activity for 1983 and 1984 (1985 U.S. Industrial Outlook), as noted in the following table. According to this source, the value of shipments in the shirts & nightwear industry declined at a compound annual rate of -1.0% in constant (1972) dollar terms, between 1972 and 1982.

Shirts & Nightwear (SIC 2321*)

	1984(e)	1983(e)	1982	1977
Number of companies	na	na	535	669
Number of establishments, total	na	na	741	928
Number with 20 or more employees	na	na	560	679
Employees, total (thous.)	97.8	89.8	88.7	114.7
Production workers (thous.)	84.7	77.2	76.0	103.0
Payroll (mil. $)	na	na	$ 819.0	$ 711.3
Value added by manufacture# (mil.$)	na	na	1,785.5	1,445.7
Value of industry shipments## (mil.$)	$3,645.0	$3,535.0	3,477.7	2,934.6
Capital expenditures, new (mil.$)	na	na	37.2	25.9

Underwear (SIC 2322*)

	1982	1977	% Change 1982/1977
Number of companies	61	56	+ 8.9%
Number of establishments, total	77	76	+ 1.3
Number with 20 or more employees	51	59	- 13.6
Employees, total (thous.)	11.0	15.1	- 27.2
Production workers (thous.)	10.0	13.7	- 27.0
Payroll (mil.$)	$ 99.1	$ 92.2	+ 7.5
Value added by manufacture# (mil.$)	210.2	218.2	- 3.7
Value of industry shipments## (mil.$)	429.4	419.8	+ 2.3
Capital expenditures, new (mil.$)	3.3	2.6	+ 26.9

Knit Underwear Mills (SIC 2254*)

	1982	1977	% Change 1982/1977
Number of companies	72	80	- 10.0%
Number of establishments, total	84	92	- 8.7
Number with 20 or more employees	61	74	- 17.6
Employees, total (thous.)	22.3	25.2	- 11.5
Production workers (thous.)	20.0	23.4	- 14.5
Payroll (mil.$)	$232.3	$175.2	+ 32.6
Value added by manufacture# (mil.$)	446.2	305.7	+ 46.0
Value of industry shipments## (mil.$)	829.9	648.9	+ 27.9
Capital expenditures, new (mil.$)	9.3	14.5	- 35.9

(continued)

GENERAL INDUSTRY STATISTICS

Neckwear (SIC 2323*)

	1982	1977	% Change 1982/1977
Number of companies	165	198	- 16.7%
Number of establishments, total	170	207	- 17.9
Number with 20 or more employees	91	81	+ 12.3
Employees, total (thous.)	6.7	6.3	+ 6.3
Production workers (thous.)	5.3	5.1	+ 3.9
Payroll (mil.$)	$ 83.0	$ 57.5	+ 44.3
Value added by manufacture# (mil.$)	184.5	117.5	+ 57.0
Value of industry shipments## (mil.$)	335.0	223.8	+ 49.7
Capital expenditures, new (mil.$)	4.9	2.6	+ 88.5

Hats & Caps (SIC 2352*)

	1982	1977	% Change 1982/1977
Number of companies	285	230	+ 23.9%
Number of establishments, total	314	258	+ 21.7
Number with 20 or more employees	136	122	+ 11.5
Employees, total (thous.)	13.2	12.4	+ 6.5
Production workers (thous.)	11.8	11.1	+ 6.3
Payroll (mil.$)	$132.2	$ 85.1	+ 55.3
Value added by manufacture# (mil.$)	244.7	152.7	+ 60.2
Value of industry shipments## (mil.$)	432.4	284.8	+ 51.8
Capital expenditures, new (mil.$)	7.7	3.9	+ 97.4

Hosiery (SIC 2252*)

	1982	1977	% Change 1982/1977
Number of companies	376	382	- 1.6%
Number of establishments, total	420	415	+ 1.2
Number with 20 or more employees	263	257	+ 2.3
Employees, total (thous.)	32.6	32.2	+ 1.2
Production workers (thous.)	28.8	29.0	- 0.7
Payroll (mil.$)	$ 326.5	$218.7	+ 49.3
Value added by manufacture# (mil.$)	617.3	401.5	+ 53.7
Value of industry shipments## (mil.$)	1,443.4	921.3	+ 56.7
Capital expenditures, new (mil.$)	31.4	14.8	+112.2

na not available
(e) estimated

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

SIC 2321 comprises establishments primarily engaged in manufacturing men's, youths' and boys' shirts, collars and nightwear from purchased woven or knit fabric (cut-and-sewed). Also includes manufactures of knit outerwear sports shirts from purchased knit fabric. Does not include work shirt manufacturers. For 1977 the 928 establishments (plants) in this industry included 469 manufacturers, 108 jobbers, 192 independent contractors and 159 multiplant company contractors.

(continued)

(footnotes continued)

SIC 2322 includes establishments primarily engaged in manufacturing men's, youths', boys' underwear cut and sewed from purchased woven or knit fabric.

SIC 2254 includes establishments primarily engaged in knitting underwear and nightwear from yarn, or in making them from knit fabric produced in the same mill.

SIC 2323 comprises establishments primarily engaged in manufacturing men's, youths' and boys' neckties, scarfs and mufflers cut and sewed from purchased woven or knit fabric.

SIC 2352 includes establishments primarily engaged in manufacturing hats, caps and hat bodies. Millinery is not included.

SIC 2252 includes mills primarily making men's and boys' hosiery. It includes mills engaged in knitting, dyeing or finishing hosiery except women's hosiery. In addition to men's and boys' hosiery, the industry makes anklets for women and children, slipper socks, etc.

Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for more purposes the best value of measure of individual industries.

Value of industry includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made in these industries. The value of the primary product alone (men's furnishings) of these industries, plus the value of these products produced by manufacturers classified in other industries, identified as "product shipments," are shown on pages 14 and 15. It should be noted that the value data are in current dollars, and inflation accounts for a significant share of reported increases compared with 1977 values.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982

International Trade Association
1985 U.S. Industrial Outlook.

Employment & Earnings

Between October 1983 and 1984, the only measured category of men's accessories to record an increase in total employment was shirts and nightwear, which had a gain of 2.3% during the period. Likewise, the only furnishings group to measure a gain in production worker employment was the shirts and nightwear group. Average weekly hours and average overtime hours decreased in all three measured furnishings categories.

It should be noted that the Bureau of Labor Statistics uses a different methodology in compiling employment data than used by the Census Bureau, and thus the figures of these two sources are not directly comparable.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings Among Furnishings Manufacturers
(Includes Producers of Both Men's & Boys')

Industry	Monthly Averages Oct. 1984(p)	Oct. 1983	% Change Oct. 1984/1983	Annual Averages 1983	1982	% Change 1983/82
Shirts & nightwear (SIC 2321*)						
All employees (thous.)	99.9	97.7	+ 2.3%	93.4	92.3	+ 1.2%
Production workers (thous.)	86.6	84.0	+ 3.1	80.4	79.1	+ 1.6
Avg. weekly earnings	$176.29	$176.70	- 0.2	$173.85	$163.33	+ 6.4
Avg. hourly earnings	$ 4.87	$ 4.75	+ 2.5	$ 4.75	$ 4.64	+ 2.4
Avg. weekly hours	36.2	37.2	- 2.7	36.6	35.2	+ 4.0
Avg. overtime hours	0.9	1.3	-30.8	1.1	1.0	+10.0
Hosiery (SIC 2252*)						
All employees (thous.)	34.6	35.6	- 2.8	34.6	32.4	+ 6.8
Production workers (thous.)	30.9	32.1	- 3.7	31.3	29.3	+ 6.9
Avg. weekly earnings	$209.62	$206.12	+ 1.7	$207.04	$185.44	+11.6
Avg. hourly earnings	$ 5.41	$ 5.65	- 4.2	$ 5.42	$ 5.18	+ 4.6
Avg. weekly hours	37.1	38.1	- 2.6	38.2	35.8	+ 6.7
Avg. overtime hours	1.7	2.1	-19.0	2.3	1.5	+53.3
Knit underwear mills (SIC 2254*)						
All employees (thous.)	30.3	31.0	- 2.3	30.1	28.7	+ 4.9
Production workers (thous.)	26.1	26.4	- 1.1	25.6	24.2	+ 5.8
Avg. weekly earnings	$200.55	$204.06	- 1.7	$199.50	$177.33	+12.5
Avg. hourly earnings	$ 5.54	$ 5.37	+ 3.1	$ 5.32	$ 5.17	+ 2.9
Avg. weekly hours	36.2	38.0	- 4.7	37.5	34.3	+ 9.3
Avg. overtime hours	1.1	1.7	-35.2	1.6	0.9	+77.8

* For definition of SIC code, see pages 3 and 4.

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings

Concentration in the Industry

Although manufacturers in the men's furnishings industry tend to be small operations, it is the larger plants (those with 100 or more employees) which account for the lion's share of shipments. According to Sales and Marketing Management magazine, plants with 100 or more employees accounted for 94% of industry shipments in the underwear segment in 1984. Plants of this same size accounted for 90% of shirt & nightwear shipments as well as 77% of hosiery shipments in the same year.

Data on the number of plants by employment size for 1982 are available from the U.S. Department of Commerce as summerized below. Information on a company basis for 1982 will be issued by the Census Bureau in coming months, based on the complete census of manufactures.

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

Furnishings Manufacturing Establishments By Employment Class Size, 1982

	Shirts & Nightwear (SIC 2321*)	Underwear Cut & Sewn (SIC 2322*)	Knit Underwear Mills (SIC 2254*)
Total establishments	689	68	84
Number of employees:			
Under 10 employees	79	10	13
10 - 49 employees	175	15	13
50 - 99 employees	114	12	18
100 - 499 employees	300	25	28
500 or more employees	21	6	12

	Neckwear (SIC 2323*)	Hats & Caps (SIC 2352*)	Hosiery (SIC 2252*)
Total establishments	167	269	393
Number of employees:			
Under 10 employees	51	81	77
10 - 49 employees	74	112	157
50 - 99 employees	28	39	58
100 - 499 employees	13	35	96
500 or more employees	1	2	5

* For definition of SIC code, see pages 3 and 4.

Source: U.S. Bureau of Commerce, County Business Patterns, 1982.

Employment & Share of Industry Shipments in Large Furnishings Manufacturing Plants, 1984

	Number of Plants With 20+ Employees	Number of Plants With 100+ Employees	% of Industry Shipments Accounted for by Plants With 100 or more Employees
Shirts & nightwear (SIC 2321*)	577	362	90%
Underwear, cut-&-sewn (SIC 2322*)	71	51	94
Knit underwear mills (SIC 2254*)	87	58	95
Neckwear (SIC 2323*)	114	24	52
Hats & caps (2352*)	165	52	64
Hosiery (SIC 2252*)	265	102	78

* For definition of SIC codes see pages 3 and 4.

Source: Sales and Marketing Management, "Survey of Industrial Purchasing Power", April 1985. All rights reserved.

GENERAL INDUSTRY STATISTICS

Location of the Industry

Data from the 1982 Census of Manufactures covering information on manufacturing operations by state is currently available from the Census Bureau. According to the results, New York remained the leader in three out of the six categories which make up the furnishings industry, as far as value of shipments. Georgia, Pennsylvania and North Carolina were the leaders in the remaining three.

Detailed statistics are summarized below.

Leading Manufacturing States in Furnishings Production, 1982

	No. of Establishments		Value of Shipments
	Total	With 20+ Employees	(Mil. $)
Shirts & nightwear (SIC 2321*)			
Leading states:			
New York	108	49	$ 548.7
California	91	51	107.8
North Carolina	87	80	497.2
Pennsylvania	54	47	243.7
Alabama	47	46	376.9
Florida	47	27	56.0
Tennessee	45	41	264.7
Georgia	43	40	367.9
U.S. total	741	560	3,477.7
Leading states, total	522	381	2,462.9
Percent of U.S. total	70.4%	68.0%	70.8%
Underwear, cut-&-sewn (SIC 2322*)			
Leading states:			
New York	12	3	(D)
Georgia	11	10	48.5
Pennsylvania	9	6	(D)
Kentucky	5	4	(D)
South Carolina	4	4	35.0
Tennessee	4	4	(D)
U.S. total	77	51	429.4
Leading states, total	45	31	na
Percent of U.S. total	58.4%	60.8%	na
Knit underwear mills (SIC 2254*)			
Leading states:			
Pennsylvania	26	21	151.9
New York	15	8	62.4
North Carolina	14	12	210.9
Georgia	5	4	46.0
U.S. total	84	61	829.9
Leading states, total	60	45	471.2
Percent of U.S. total	71.4%	73.8%	56.8%

(continued)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Leading Manufacturing States in Furnishings Production, 1982
(continued)

	No. of Establishments		Value of Shipments
	Total	With 20+ Employees	(Mil. $)
Neckwear (SIC 2323*)			
Leading states:			
New York	77	38	$ 121.1
California	17	8	46.7
North Carolina	11	8	31.7
Louisiana	3	2	(D)
U.S. total	170	91	335.0
Leading states, total	108	56	na
Percent of U.S. total	63.5%	61.5%	na
Hats & Caps (SIC 2352*)			
Leading states:			
New York	87	29	$ 69.7
California	23	7	20.4
Texas	22	12	(D)
Pennsylvania	23	7	33.8
Kentucky	7	6	25.5
Virginia	6	4	(D)
U.S. total	314	136	432.4
Leading states, total	168	66	na
Percent of U.S. total	53.5%	48.5%	na
Hosiery (SIC 2252*)			
Leading states:			
North Carolina	274	171	$ 869.6
Alabama	41	24	91.4
Tennessee	33	25	174.5
Georgia	19	12	88.8
U.S. total	420	263	1,411.3
Leading states, total	367	232	1,224.3
Percent of U.S. total	87.4%	88.2%	86.7%

* For definition of SIC code see pages 3 and 4.
(D) Data withheld by the Census Bureau to avoid disclosing figures for individual firms.
na not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982,
Industry Series.

PRODUCTION

Annual data on production of major types of men's furnishings, based on a survey of known manufacturers and jobbers (except the very small), is reported in the Current Industrial Reports issued by the U.S. Bureau of the Census. According to the Bureau, domestic production of men's accessories increased in seven of the 11 measured categories in 1983, despite the continuing influx of imports into the market which accelerated, however, in 1984.

The largest increase in production was registered by the supporter-type, knit briefs category which registered an increase of 24.0% in unit shipments in 1983 reaching a total of 30 million dozen. The only group to record a decline of more than 10% in production in 1983 was 1/4-sleeve undershirts whose total declined 14.2% to 12 million dozen.

As with all other areas of apparel, suppliers engaged from outside the firm to furnish some or all components at various stages of the manufacturing process is becoming a watch-word for the furnishings industry. Many firms in the industry now take advantage of "807" operations which allows domestic firms to ship pre-cut parts of a garment to foreign countries with lower labor costs for assembly; then reimport them, paying duty only on the value added to the cut pieces and labeling them as domestically produced. Manufacturers involved in these operations are able to take advantage of both the higher level of technology available in the U.S. for cutting operations and the lower labor costs afforded by overseas assembly.

Summary of Production of Reported Furnishings, 1982, 1983
(Men's only, except where noted)

	Thous. Dozen		% Change
	1983	1982	1983/1982
Dress & business shirts, incl. uniforms	7,443	7,484	- 0.5%
Pajamas & other nightwear	1,283	1,333	- 3.8
Robes (men's & boys')	801	747	+ 7.2
Lightweight undershirts with 1/4 sleeve, excl. T-shirts made for outerwear	12,121	14,125	- 14.2
Sleeveless type athletic undershirts (men's & boys')	2,896	2,779	+ 4.2
Thermal underwear tops (men's & boys')	1,798	1,841	- 2.3
Thermal underwear bottoms (men's & boys')	1,930	1,777	+ 8.6
Thermal one-piece underwear (men's & boys')	98	93	+ 5.4
Boxer shorts	4,608	4,394	+ 4.9
Supporter-type, knit briefs	29,959	24,170	+ 24.0
Hosiery, size ten & up	66,479	62,002	+ 7.2

na not available

Source: U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23-E(83)-1,
Underwear & Nightwear, MA23G(83)-1.

PRODUCTION

Production of Reported Types of Men's Furnishings, By Type of Fabric & Construction, 1983, 1982

	Thous. Doz. 1983	Thous. Doz. 1982(r)	% Change 1983/1982
Men's dress & business shirts, incl. uniform, total	7,443	7,484	- 0.5%
By fabric:			
All cotton & chiefly cotton	1,791	1,350	+ 32.7
All man-made & chiefly man-made	5,388	5,809	- 7.2
All other fabric	7	8	- 12.5
Fabric, n.s.k.	257	317	- 18.9
By construction:			
Woven fabric	6,604	6,491	+ 1.7
Knit fabric	397	544	- 27.0
Construction, n.s.k.	422	449	- 6.0
Uniform shirts	955	1,065	- 10.3
Men's pajamas & other nightwear, excl. robes, total	1,283	1,333	- 3.8
By construction:			
Woven fabric	901	917	- 1.7
Knit fabric	160	196	- 18.4
Construction, n.s.k.	222	220	+ 0.9
By fabric:			
All cotton & chiefly cotton	778	833	- 6.6
All man-made & chiefly man-made / All other fabric	278	277	+ 0.4
Fabric, n.s.k.	227	223	+ 1.8
Men's & boys' robes, total	801	747	+ 7.2
By construction:			
Woven fabric	308	257	+ 19.8
Knit fabric	421	415	+ 1.4
Construction, n.s.k.	72	75	- 4.0
By fabric:			
All cotton & chiefly cotton	168	154	+ 9.1
All man-made & chiefly man-made / All other fabric	561	517	+ 8.5
Fabric, n.s.k.	72	76	- 5.3
Knit underwear			
Men's lightwear undershirts with 1/4 sleeve, excl. T-shirts made for outerwear, total	12,121	14,125	- 14.2
By fabric:			
Cotton/polyester blended fabric	3,578	4,614	- 22.5
All cotton & all other cotton blends	8,438	9,274	- 9.0
All other fabric / Fabric, n.s.k.	105	240	- 56.3

(continued)

PRODUCTION

Production of Reported Types of Men's Furnishings, By Type of Fabric & Construction, 1983,1982
(continued)

	Thous. Doz. 1983	Thous. Doz. 1982(r)	% Change 1983/1982
Men's & boys' sleeveless athletic type undershirts, total	2,896	2,779	+ 4.2
By fabric:			
Cotton/polyester blended fabric	767	713	+ 7.6
All cotton & all other cotton blends	2,117	2,052	+ 3.2
All other fabric / Fabric, n.s.k.	12	14	- 14.3
Men's & boys' thermal underwear, incl. winter weight, total	3,826	3,711	+ 3.1
Tops, total	1,798	1,841	- 2.3
By fabric:			
Cotton/polyester blend	1,119	1,193	- 6.2
All cotton & other cotton blends	562	561	+ 0.2
All other fabric / Fabric, n.s.k.	117	87	+ 34.5
Bottoms, total	1,930	1,777	+ 8.6
By fabric:			
Cotton/polyester blend	1,085	958	+ 13.3
All cotton & other cotton blends	658	684	- 3.8
All other fabric / Fabric, n.s.k.	187	135	+ 38.5
One-piece (union-suits), total	98	93	+ 5.4
By fabric:			
Cotton/polyester blend	35	46	- 23.9
All cotton & all other cotton blends / All other fabric	63	47	+ 34.0
Shorts & briefs, knit			
Men's supporter-type, total	29,959	24,170	+ 24.0
Cotton/polyester blend	8,244	8,053	+ 2.4
All-cotton & all other cotton blends	21,061	15,328	+ 37.4
All other fabric	654	789	- 17.1
Boxer shorts, men's, woven	4,608	4,394	+ 4.9
Cotton/polyester blend	4,161	4,156	+ 0.1
All-cotton & all other cotton blends / All other fabric	447	238	+ 87.8

(r) revised n.s.k. not specified by kind

Source: U.S. Bureau of the Census, Current Industrial Reports, MA-23E & MA23G(83)-1 (Issued July 1984).

PRODUCTION

Production of Reported Types of Men's Hosiery by Type of Fabric & Construction, 1982, 1983

	Thous. Dozen		% Change
	1983	1982	1983/1982
Men's hosiery, size 10 & up, total (thous. pairs)	66,479	62,002	+ 7.2%
Footsocks	471	352	+ 33.8
Anklets	26,721	26,723	--
Mid-calf/crew	17,746	17,274	+ 2.7
Knee-highs	21,541	17,653	+ 22.0

Source: National Association of Hosiery Manufacturers, 1983 Hosiery Statistics.

Materials Consumed in Production

Value of Materials Consumed in the Production of Specified Men's Furnishings, 1977, 1982
(Delivered cost; millions of current $)

	1982	1977	% Change 1982/1977
Shirts & nightwear (SIC 2321*), total	$1,182.8	$1,107.9	+ 6.8%
Broad woven fabrics	413.6	400.7	+ 3.2
Purchased knitted fabrics	452.6	365.8	+ 23.7
All other materials, containers & supplies	316.6	341.4	- 7.3
Underwear (cut-&-sewn) (SIC 2322*), total	177.5	182.3	- 2.6
Broad woven fabrics	30.3	30.3	--
Purchased knitted fabrics	118.7	112.4	+ 5.6
All other materials, containers & supplies	28.5	39.6	- 28.0
Knit underwear mills (SIC 2254*), total	329.9	325.8	+ 1.3
Purchased knitted fabrics	5.3	7.5	- 29.3
Carded cotton yarns	83.8	94.5	- 11.3
Combed cotton yarns	35.9	40.7	- 11.8
Man-made fiber yarns, filament & spun	57.4	34.4	+ 66.9
All other yarns	28.8	25.7	+ 12.1
All other materials, containers & supplies	118.7	123.0	- 3.5
Neckwear (SIC 2323*), total	127.7	93.4	+ 36.7
Broad woven fabrics	61.8	49.5	+ 24.8
Purchased knitted fabrics	6.3	1.8	+250.0
All other materials, containers & supplies	59.6	42.1	+ 41.6

(continued)

PRODUCTION

Materials Consumed in Production

Value of Materials Consumed in the Production of Specified Men's Furnishings, 1977, 1982
(Delivered cost; millions of current $)
(continued)

	1982	1977	% Change 1982/1977
Hosiery (SIC 2252*), total	$ 734.5	$ 478.1	+ 53.6%
Hosiery in the griege	204.9	134.8	+ 52.0
Cotton yarns	78.4	53.1	+ 47.6
Nylon spun yarns	26.6	28.7	- 7.3
Acrylic yarns	146.2	71.7	+103.9
Nylon filament yarns	68.4	42.6	+ 60.6
Spandex filament yarns	10.7	4.8	+122.9
All other yarns	56.3	29.7	+ 89.6
All other materials, containers & supplies	143.0	112.7	+ 26.9

*For a definition of SIC code, see pages 3 and 4.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
Industry Series.

Seasonality in Production

Percent of Men's Dress & Business Shirt Cuttings by Month, 1983, 1984

Year	Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
1984	100.0%	8.0%	9.2%	8.7%	8.2%	9.0%	9.1%	5.5%	8.4%	8.6%	9.5%	9.2%	6.6%
1983	100.0	7.8	8.3	9.7	8.1	8.5	9.1	4.8	9.1	9.6	8.5	8.6	7.8

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports,
Men's & Boys' Outerwear, MA-23E(81)-1

SHIPMENTS

According to data from the 1982 Census of Manufactures, the only furnishings category to register a decline in shipments between 1977 and 1982 was men's and boys' dress and sport shirts (-11.0%). Every other measured category registered gains in the period ranging from 1.1% for unspecified hosiery to a high of 180.9% for men's and boys' underwear made from purchased materials, on a current dollar basis, not adjusted for inflation.

According to the International Trade Administration, U.S. Department of Commerce, the total value of product shipments of men's and boys' shirts and nightwear (including sport shirts) increased 13.1% between 1982 and 1984. In constant (1972) dollar terms, this increase was a still impressive 15.0%.

SHIPMENTS

Value of Shipments by All U.S. Producers
Of Specified Categories of Men's & Boys' Furnishing 1977, 1982
(current dollars)

	Millions of $ 1982	Millions of $ 1977	% Change 1982/1977
Men's & boys' shirts (incl. sport shirts) & nightwear	$3,964.4	$2,836.5	+ 39.8%
Men's & boys' knit outerwear sport shirts	1,928.4	na	--
Men's & boys' dress & sport shirts	1,227.4	1,379.1	- 11.0
Men's & boys' nightwear	167.0	na	--
Contract work on men's & boys' shirts & nightwear	474.5	372.6	+ 27.3
Shirts & nightwear, n.s.k.	167.1	157.5	+ 6.1
Men's & boys' underwear (made from purchased materials)	983.2	350.0	+180.9
Men's, youths' & boys' neckwear	310.4	211.3	+ 46.9
Hats & caps, except millinery	416.8	270.5	+ 54.1
Hats & hat bodies, exc. cloth & millinery	83.2	66.4	+ 25.3
Cloth hats & caps	272.0	176.6	+ 54.0
Hats & caps, exc. millinery, n.s.k.	61.6	27.5	+124.0
Hosiery			
Men's finished seamless hosiery	655.0	464.6	+ 41.0
All other finished seamless hosiery	452.1	274.3	+ 64.8
Seamless gray hosiery, exc. women's full & knee-high	113.2	62.0	+ 82.6
Hosiery, n.e.c., n.s.k.	61.9	61.2	+ 1.1
Knit underwear & nightwear	574.8	431.0	+ 33.4

n.s.k. not specified by kind
n.e.c. not elsewhere classified
na not available

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
Industry Series.

Information on specific categories of men's furnishings is available from the U.S. Census Bureau's Current Industrial Report series. Pertinent data to the furnishings industry is summarized below.

Between 1982 and 1983, shipments of supporter-type, men's briefs grew fastest, increasing 25.5% during the period to a total of $423.5 million dollars. The largest decline was recorded by men's thermal underwear tops falling 5.1% to $70.5 million. The only other furnishings groups to record declines in the period were pajamas and nightwear (-5.7%), 1/2-sleeve undershirts (-3.7%) and thermal underwear overall (-0.3%).

SHIPMENTS

Value of Shipments of Specified Types of Furnishings, 1982, 1983
(Men's only, except where noted)

	Millions of $		% Change
	1983	1982	1983/1982
Dress & business shirts, incl. uniform	$780.0	$749.0	+ 4.1%
Pajamas & other nightwear	92.1	97.7	- 5.7
Robes (men's & boys')	95.5	87.0	+ 9.8
Boxer shorts, woven	84.6	78.9	+ 7.2
Supporter-type, knit briefs	423.5	337.3	+ 25.5
Lightweight undershirts with 1/4 sleeve, excl. outerwear T-shirts	235.9	244.9	- 3.7
Sleeveless athletic-type undershirts (men's & boys')	39.0	37.5	+ 4.0
Thermal underwear (men's & boys')	145.9	146.3	- 0.3
Tops (undershirts)	70.5	74.5	- 5.4
Bottoms (drawers, etc.)	65.5	62.1	+ 5.5
One piece (union suits)	9.9	9.7	+ 2.1

Source: U.S. Bureau of the Census,
Current Industrial Reports,
MA23E and MA23G (83)-1 (issued July 1984).

PRODUCER PRICES

While the producer (factory) prices of all commodities rose 1.5% between December 1983 and December 1984, prices of men's and boys' wear, overall, were up 2.1%. The largest increase noted among reported types between December 1983 and 1984 was for ties, while the producer price for knit shorts and briefs remained stable.

Producer Price Indexes For Specified Furnishings
(1977 = 100, unless noted)

	December Totals			Annual Average		
			% Change			% Change
	1984	1983	1984/83	1983	1982	1983/82
All items*	310.7	306.1	+ 1.5%	303.1	299.3	+ 1.3%
Men's & boys' wear, all types*	228.5	223.9	+ 2.1	222.4	219.5	+ 1.3
Men's dress & business shirts	155.2	150.4	+ 3.2	148.4	141.5	+ 4.9
Men's & boys' knit undershirts*	268.9	267.3	+ 0.6	266.8	256.8	+ 3.9
Men's & boys' knit shorts & briefs	139.4	139.4	--	139.0	137.5	+ 1.1
Men's & boys' ties	134.2	129.7	+ 3.5	128.4	125.3	+ 2.5

* 1967 = 100

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

FOREIGN TRADE

Imports

As they have in almost every other area of apparel, imports have become a major problem for domestic furnishings manufacturers. The International Trade Administration reports in the 1985 U.S. Industrial Outlook that imports of men's and boys' shirts and nightwear have grown from 10.7% of new supply in 1972 to 30.5% in 1984. This same source reports that during this same 12-year period the dollar value of imports of shirts and nightwear has risen by more than 600% to around $2.5 billion.

Detailed figures on imports and exports from the Census Bureau are covered below.

Quantity & Value of Imports of Specified Furnishings, 1983, 1984

	Quantity (Thous. Doz.)		% Change	Value C.I.F.* (Thous. $)		% Change
	1984	1983	1984/83	1984	1983	1984/83
Shirts	2,292.4	1,919.5	+ 19.4%	$180,286	$115,496	+ 56.1%
Dress, cotton	2,167.0	1,826.0	+ 18.7	175,151	112,002	+ 56.4
Work, cotton	125.4	93.5	+ 34.1	5,135	3,494	+ 47.0
Dressing gowns & robes	164.5	125.8	+ 30.8	17,712	12,170	+ 45.5
Not knit						
Cotton	143.2	110.9	+ 29.1	16,441	11,218	+ 46.6
Wool	0.8	0.8	--	312	195	- 60.0
Man-made	20.5	14.1	+ 45.4	959	757	+ 26.7
Underwear	na	na	--	24,167	16,370	+ 47.6
Knit	na	na	--	4,471	4,192	+ 6.7
Not knit	2,156.0	1,709.1	+ 26.1	19,696	12,178	+ 61.7
Pajamas	1,221.4	1,137,2	+ 7.4	56,307	49,582	+ 13.6
Not knit						
Cotton	1,084.6	1,017.4	+ 6.6	50,688	44,784	+ 13.2
Man-made	136.8	119.8	+ 14.2	5,619	4,798	+ 17.1
T-shirts, cotton knit	1,521.4	1,341.0	+ 13.5	22,374	17,994	+ 24.3
Neckties, textile material	1,569.3	952.7	+ 64.7	48,102	30,447	+ 58.0
Headwear, fur not on the skin	62.5	16.1	+288.2	2,976	1,833	+ 62.4

* The C.I.F. value represents the value of imports at the first port of entry in the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census, U.S. General Imports, FT135, Dec. 1983, 1984.

FOREIGN TRADE

Exports

The U.S. Department of Commerce reports that between 1982 and 1984, exports of men's and boys' shirts and nightwear declined from 2.4% to 1.2% of shipments. Overall the value of exports of men's furnishings dropped 23.6% between 1983 and 1984 with no overall category recording an increase.

Quantity & Value of Exports of Specified Furnishings, 1982, 1983

	Quantity (Thous. Dozens)		% Change	F.A.S. Value* (Thous. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Furnishings, reported categories, total	na	na	--	$51,819.8	$67,840.0	- 23.6%
Dress shirts, not knit	59.7	160.8	- 62.9%	1,971.5	4,855.2	- 59.4
Cotton	33.0	70.2	- 53.0	834.3	1,096.9	- 23.9
Man-made	26.7	90.6	- 70.5	1,137.2	3,759.1	+ 69.7
Work shirts, not knit	281.2	153.4	+ 83.3	8,022.7	3,506.6	+128.8
Cotton	215.2	93.9	+129.2	6,615.8	2,153.0	+207.3
Man-made	66.0	59.5	+ 10.9	1,406.9	1,353.6	+ 3.9
Dress & work shirts, knit	184.7	209.1	- 11.7	5,302.9	7,668.3	- 30.8
Cotton	131.9	178.5	- 26.1	4,359.3	6,736.6	- 35.3
Man-made	52.8	30.6	+ 72.5	943.6	931.7	+ 1.3
Robes & dressing gowns, not knit	32.5	1,181.2	- 97.2	549.2	3,429.7	- 84.0
Cotton	11.2	1,173.3	- 99.0	248.0	3,161.9	- 92.2
Wool	0.6	1.0	- 40.0	38.1	22.9	+ 66.4
Man-made	20.7	7.9	+162.0	263.1	244.9	+ 7.4
Pajamas & other nightwear, total	214.5	297.3	- 27.9	6,950.3	10,351.3	- 32.9
Not knit	21.3	21.8	- 2.3	587.9	753.9	- 22.0
Cotton	16.0	14.0	+ 14.3	449.6	464.5	- 3.2
Wool	0.1	0.8	- 87.5	9.2	19.3	- 52.3
Man-made	0.6	2.5	- 76.0	38.7	149.6	- 74.1
Other textile material	4.6	4.5	- 2.2	90.4	120.1	- 24.7
Knit	193.2	275.5	- 29.9	6,362.4	9,597.8	- 33.7
Cotton	183.5	266.7	- 31.2	5,921.5	9,157.0	- 35.3
Man-made	6.5	3.9	+ 66.7	395.5	272.5	+ 45.1
Wool	2.1	2.5	+ 16.0	10.1	90.3	- 88.8
Other textile material	1.1	2.4	- 54.2	35.3	78.0	- 54.7

(continued)

FOREIGN TRADE

Exports

Quantity & Value of Exports of Specified Furnishings, 1982, 1983
(continued)

	Quantity (Thous. Dozens)		% Change	F.A.S. Value* (Thous. $)		% Change
	1983	1982	1983/82	1983	1982	1983/82
Underwear, total	867.5	1,129.0	- 23.2%	$11,289.2	$14,476.2	- 22.0%
Underwear, briefs, drawers & undershorts	650.0	773.8	- 16.0	8,308.8	9,496.2	- 12.5
Not knit	416.0	508.6	- 18.2	4,532.6	5,239.0	- 13.5
Cotton	410.9	493.3	- 16.7	4,399.0	5,056.6	- 13.0
Man-made	5.1	15.3	- 66.7	133.6	182.4	- 26.8
Knit	234.0	265.2	- 11.8	3,776.2	4,257.2	- 11.3
Cotton	228.4	230.8	- 1.0	3,664.0	3,694.8	- 0.8
Man-made	5.6	34.4	- 83.7	112.2	562.4	- 80.0
Underwear, other than briefs, drawers & undershorts	183.5	289.9	- 36.7	2,415.2	3,782.4	- 36.1
Not knit	47.6	91.1	- 47.7	563.5	1,054.3	- 46.6
Cotton	32.3	42.9	- 24.7	386.3	585.5	- 34.0
Man-made	15.3	48.2	- 68.3	177.2	468.8	- 62.2
Knit	135.9	198.8	- 31.6	1,851.7	2,728.1	- 32.1
Cotton	72.3	92.0	- 21.4	1,065.6	1,176.0	- 9.4
Man-made	63.6	106.8	- 40.4	786.1	1,552.1	- 49.4
Underwear, nspf, of textile material not specified	34.0	65.3	- 47.9	565.2	1,197.6	- 52.8
Not knit	17.3	24.3	- 28.8	262.6	307.5	- 14.6
Knit	16.7	41.0	- 59.3	302.6	890.1	- 66.0
T-shirts, all white, knit	942.1	1,173.1	- 19.7	15,215.5	20,778.6	- 26.8
Cotton	884.0	1,004.5	- 12.0	14,221.3	17,474.3	- 18.6
Man-made	58.1	168.6	- 65.5	994.2	3,304.6	- 69.9
Neckties, textile materials	154.9	171.5	- 9.7	2,518.5	2,774.1	- 9.2
Not knit	139.1	158.2	- 12.1	2,327.0	2,454.0	- 5.2
Knit	15.8	13.3	+ 18.8	191.5	320.1	- 40.2

nspf not specially provided for.

* F.A.S. value is the value at the U.S. port of export, based on the transaction price including inland freight, insurance, and other charges incurred in placing the merchandise alongside the carrier at the U.S. port of exportation. The value, as defined, excludes the cost of loading the merchandise aboard the exporting carrier and also excludes freight, insurance, and any other charges of transportation costs beyond the port of exportation.

Source: U.S. Bureau of the Census,
U.S. General Exports FT446,
December 1983 and 1982.

THE POTENTIAL MARKET

According to the U.S. Census Bureau projections, the number of American males aged 25-54 years will swell to 40.8 million by 2005, a 56.9% increase over 1984. During the same time period, the ranks of males aged 55-64 will continue on an upward spiral and number approximately 14.0 million in 2005, a jump of 35.5% over 1984. Better than four out of every 10 males will fall into these age brackets in 2005, compared with three out of 10 in 1984.

Population Projections - 1984, 1994, 2005
(Middle Series*)

	Number (Thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
Male							
Total, all ages	115,073	125,464	134,297	+ 16.7%	100.0%	100.0%	100.0%
Under 5 years	9,329	9,635	8,931	- 4.3	8.1	7.7	6.6
5 to 9 years	8,296	9,866	9,094	+ 9.6	7.2	7.9	6.8
10 to 15 years	10,708	11,245	11,698	+ 9.2	9.3	9.0	8.7
16 years & over	86,742	94,718	104,574	+ 20.5	75.4	75.4	77.9
16 - 19	7,653	6,712	8,058	+ 5.3	6.6	5.3	6.0
20 - 34	31,522	29,725	27,416	- 13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+ 56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+ 35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+ 27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+ 20.4	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports
Series P-25, No. 952 (May 1984)

Male Height/Weight Groups

The following table covers 1983 estimates on the current male population (18 - 74 years of age) in specified height/weight groups, based on an analysis of information from the U.S. Department of Health and Human Services and the U.S. Census Bureau.

Close to 2.6 million men, 3.3% of the adult male population, stand six feet two inches or taller. At the other end of the spectrum, over 10 million men, 13.6% of males, are under five feet six inches tall. Almost half (47.2%) of men between the ages of 18 and 74 fall within the five feet nine inch and six feet one inch height range.

THE POTENTIAL MARKET

Male Height/Weight Groups

Estimated Distribution of the U.S. Male Population
By Height/Weight Groups, 1983
(Numbers in Thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2" & Over
Total, 18-74 years	78,116	10,624	28,044	36,870	2,578
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	17,576	5,312	7,187	4,921	156
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	32,652	3,906	13,826	14,530	391
Percent	41.8%	5.0%	17.7%	18.6%	0.5%
180-199 lbs.	15,389	938	4,687	9,061	703
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,374	391	1,952	6,249	781
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,125	78	391	2,109	547
Percent	4.0%	0.1%	0.5%	2.7%	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health Education & Welfare) 1979 & U.S. Bureau of Census population projections.

Current Trends

According to a national survey of 4,500 retailers, about 1,800 of which carry men's wear exclusively, conducted by Retail Merchandising Service Automation, retail sales of men's wear overall, increased 1.3% in 1984.

According to this source, every measured category of furnishings recorded a larger increase in sales in 1984 than men's wear overall. Hats & caps recorded the largest increase, 11.3% followed by neckwear (7.4%) and dress shirts (7.0%). Corresponding with the huge jump in sales recorded by hats and caps, markdowns in the group were off significantly in 1984, declining by 32%. The only other furnishings category to record a decline in 1984 was dress shirts (-9.3%).

RETAIL SALES

Current Trends

Retail Performance of Specified Furnishings Categories, 1984

	Total Retail Sales	Markup*	Markdowns*
Menswear, total	+ 1.3%	--	--
Hats & caps	+ 11.3	50.7%	+ 32.4%
Neckwear	+ 7.4	57.8	+ 28.3
Dress shirts	+ 7.0	51.8	- 9.3
Underwear, pajamas & robes	+ 2.8	51.7	- 0.7
Hosiery	+ 2.1	51.5	+ 16.1

*January - November

Source: Retail Merchandising Service Automation, Daily News Record (1/28/85)

According to an analysis of the men's wear market overall, performed by Kurt Salmon Associates, retail sales of men's wear are projected to rise 3.0% between 1984 and 1985.

Dress Shirts

Sales of men's dress shirts, which were up 7.0% in 1984, are expected to show slower growth in 1985. During 1984, the major thrust in dress shirts was contrasting color collars--a trend which is expected to continue in 1985. As the trend towards "dress up" continues, retailers believe the growth in men's dress shirts will also continue.

Neckwear

Industry analysts report that sales of men's neckwear increased about 12% in 1984, reaching $200 million in that year. 1984 marked the second consecutive year in which neckties registered double digit gains, a growth rate which many industry analysts feel will be impossible for the category to maintain through 1985. Retailers believe that the key to increased sales in 1985 will be quality, reliable customer service, and quick response to a more selective fashion market.

Underwear

Industry analysts report that sales of men's underwear recorded solid gains in 1984, with continuing fashion innovations helping the category record even better growth in 1985. Many retailers are currently reporting increased business in 1985, with the hottest items now being woven printed boxer shorts. New packaging and promotions for basic knitted briefs is also aiding the increase in sales.

Other Items

Other items such as jewelry, small leather goods, etc., are generally considered to be in the accessories field and information about them may be found in the Fact File covering Fashion Accessories (Men's and Women's). Additional information on the hosiery industry is included as a part of the Hosiery/Legwear (Men's, Women's and Children's) Fact File. Men's sport shirts are covered extensively in the Men's Sportswear, Casual Wear and Jeans Fact File.

RETAIL SALES BY STORE TYPE

Until reports on the 1982 census of retail trade are completed by the U.S. Census Bureau, available information on sales of specified men's furnishings by type of outlet is limited. Data previously published for 1977 will be revised because of a change by the Census Bureau in reporting on leased departments. In the 1982 census reports these will be counted as separate retail establishments, rather than incorporated in the store-data in which operated, as was originally reported for 1977.

According to preliminary data from the 1982 Census of Retail Trade, sales of men's dress and sport shirts represented 15.3% of total retail sales in men's & boys' wear stores while this same group accounted for 7.5% of total sales in family clothing stores. For hosiery, pajamas and underwear the percentages were 2.4% and 1.6% respectively. Comparable figures for department stores are not yet available from the 1982 census.

It must be noted that all figures currently available from the 1982 Census of Retail trade are preliminary and are subject to revision when final reports are released later in 1985.

Percent of Total Sales Accounted for by Specified Men's Furnishings in Apparel Store Types, 1977, 1982

	Total Retail Sales (Million $)	% of Total Accounted for by:			
		Dress & Sport Shirts		Hosiery, Pajamas & Underwear	
	1982(p)	1982(p)	1977	1982(p)	1977
Apparel Specialty Stores					
Men's wear stores	$ 7,685.8	15.3%	15.1%	2.4%	3.0%
Family clothing stores	13,471.4	7.5	6.6	1.6	2.4

na not available
(p) preliminary

Source: U.S. Department of Commerce, 1982 Census of Retail Trade (preliminary reports)

Men's Wear Stores

According to preliminary results of the Census Bureau's 1982 Census of Retail Trade, sales in men's and boys' clothing and furnishings stores increased by 10.8% between 1977 and 1982, reaching a total of $7.7 billion. It must be noted, however, that during this five year period, the U.S. suffered from an extremely high inflation rate the results of which have not been taken into account in these figures. It should also be noted that the results for 1982 are prelimiary and are subject to revision by the Census Bureau in final reports on the Census of Retail Trade.

The Census Bureau also reported that in 1982 there were 17,426 men's & boys' clothing and furnishings establishments with payrolls in business at any time during that year. This compares with the 17,102 firms in the men's and boys' clothing and accessories business with payrolls on December 15, 1982 as reported by the Census Bureau in County Business Patterns, 1982.

RETAIL SALES BY STORE TYPE

Men's Wear Stores

Men's & Boys' Clothing & Furnishings Stores by Employee Size, 1982

	Establishments		Employees		Annual Payroll	
	Number	% of Total	Number	% of Total	Mil. $	% of Total
Men's & boys' clothing & furnishings stores, total	17,102	100.0%	131,255	100.0%	$1,302.7	100.0%
By establishment size:						
Under 10 employees	13,362	78.1	60,317	46.0	558.0	42.8
10 to 19 employees	2,832	16.6	37,990	28.9	370.9	28.5
20 to 49 employees	781	4.6	21,888	16.7	241.9	18.6
50 to 99 employees	105	0.6	6,895	5.3	79.5	6.1
100 or more employees	22	0.1	4,165	3.2	52.4	4.0

Source: U.S. Bureau of the Census, County Business Patterns, 1982.

The U.S. Department of Commerce reported in its monthly retail sales report that between 1982 and 1984, total retail sales in men's and boys' clothing and furnishings stores increased 9.6%, to a total of $8.4 billion. This 1984 total marked an increase of 5.9% from 1983.

Number of Stores & Sales of Men's & Boys' Wear Stores

	Annual Totals			% Change	
	1984	1983	1982	1984/83	1984/82
Total sales (mil. $)	$8,432	$7,962	$7,694	+ 5.9%	+ 9.6%
No. of stores	na	na	17,102	na	na

na not available

Source: U.S. Bureau of the Census, Revised Monthly Retail Sales, BR-13-85, County Business Patterns, 1982.

According to Menswear Retailers of America, the fastest growing category of men's furnishings in specialty stores in 1983 was neckwear, up 4.9%. Dress shirts accounted for 39.1% of inventory in the furnishings department while neckwear represented 18.5%.

Selected 1981 Merchandising & Operating Results in Men's Wear Stores, 1983
(Median Results)

	Men's					
	Dress Shirts	Neck-wear	Hosiery	Under-wear	Sleep-wear	Head-wear
% change in sales from last year (66)*	+ 4.6%	+ 4.9%	+ 4.5%	+ 4.3%	+ 1.7%	+ 4.5%
% of total store sales (92)*	7.0	3.9	1.1	1.3	0.9	0.6
% of men's furnishings sales (90)*	37.9	21.0	5.9	7.6	5.1	3.7
% distribution of average inventory in men's furnishings dept. (38)*	39.1	18.5	4.9	10.0	5.5	3.6
Markdowns, % of men's furnishings sales (57)*	9.6	8.9	3.2	3.6	8.2	9.7
Number of stock turns (38)*	1.9	2.3	2.1	1.5	1.7	1.7

*Number in parenthesis refers to number of reporting firms in each category.

Source: Menswear Retailers of America, 1983 Annual Business Survey.

RETAIL SALES BY STORE TYPE

Department Stores

There were 10,035 department stores in operation in the U.S. in 1982, according to preliminary census of retail trade data, up from 8,807 operating in 1977. Sales including leased departments totaled $107.1 billion in 1982, up from $76.9 billion in 1977. Excluding leased departments, comparable figures were $99.1 billion and $71.0 billion, respectively.

Current Census Bureau data, based on the Monthly Retail Trade reports, placed the total value of department store sales at $129.3 billion in 1984, up from $116.6 billion in 1983, including leased department sales.

The National Retail Merchants Association Reports in the 1983 Merchandising and Operating Results that sales of men's furnishings rose a median 9.2% in department stores with total sales of $1 million or more. Typical sales per square foot in these furnishings departments reached $191.1 in 1983. Sales per square foot for dress shirts was $249.0 while those of ties were not reported.

Selected 1983 Merchandising & Operating Results of Men's Furnishings In Department Stores With Total Sales Over $1 Million
(Median Results)

	Total Upstairs Store (100)*	Adult Male Apparel (97)*	Men's Furnishings** (84)*	Men's Dress Shirts (36)*	Men's Ties (34)*
Net sales, % change from last year	+ 8.8	+ 10.0	+ 9.2	+ 11.9	+ 17.8
Sales, % of merchandise division	nr	100.0	41.7	10.9	4.6
Sales, % of total store	91.7	12.7	5.6	1.5	0.6
$ sales per square foot of selling space (main or largest selling unit)	$109.9	$182.8	$191.1	$249.0	nr
Cumulative markon, %	48.6	50.9	51.4	49.8	56.9
Gross margin, % of sales (incl. cash discounts)	41.9	43.1	45.6	44.9	55.2
Markdowns, % of retail sales	14.9	15.5	13.2	14.0	8.3
Number of stock turns	2.7	2.9	3.2	2.9	3.4
Selling salaries, % of sales (main or largest selling unit)	7.4	6.7	6.0	6.3	6.7
Sales promotion costs, % of sales	3.0	3.0	3.0	4.3	3.4

nr not reported
* Number in parenthesis refers to the number of reporting stores in each category.
**Men's furnishings include sport shirts, sweaters, vests, dress shirts, hosiery, pajamas, robes and underwear.

Source: National Retail Merchants Association, 1983 Merchandising & Operating Results, (1984 Edition)

CONSUMER PRICES

The consumer price index for men's furnishings and "special clothing" rose 2.6% between 1983 and 1984 while the CPI for men's shirts was up 3.2% during this same period. Overall the consumer price index for men's wear increased 1.9% according to the U.S. Bureau of Labor Statistics.

Consumer Price Index for Specified Men's Furnishings 1982-1984
(Index for all Urban Consumers)
(December 1977=100)

	Annual Average			% Change	% Change
	1984	1983	1982	1984/83	1984/82
All men's wear	121.1	118.9	116.0	+ 1.9%	+ 4.4%
Men's furnishings & special clothing	148.2	144.5	138.4	+ 2.6	+ 7.1
Men's shirts (dress & sport)	127.4	123.5	122.4	+ 3.2	+ 4.1

(p) preliminary

Source: U.S. Department of Labor, Bureau of Labor Statistics.

RETAIL ADVERTISING PATTERNS BY MONTH

Dress Shirt Retail Advertising
Percent of Year's Total Newspaper Linage Used Each Month, 1983

Month	Dress Shirts
January	3.7%
February	4.6
March	7.9
April	5.4
May	8.2
June	19.5
July	4.2
August	4.3
September	7.4
October	8.8
November	10.1
December	15.9
Total	100.0%

Source: The Advertising Checking Bureau, Inc.- Neustadt Reports Div. (based on retail newspaper advertising linage in 7 markets: Chicago, Philadelphia, Cincinnati, Dallas, Cleveland, Los Angeles and Washington, D.C.)

CONSUMER BUYING HABITS

An analysis of the trend in consumer purchases of apparel, based on information compiled by the Market Research Corporation of America, has been reported by Kurt Salmon Associates.

A switch in preference away from knits to woven sport shirts is indicated for 1985, reversing the pattern in purchases last year.

Year-To-Year % Change In Unit Purchases by Consumers

	Projected 1985/1984	1984/1983	1983/1982	1982/1981
Men's dress shirts	+ 2%	+ 8%	- 1%	- 1%
Woven sport shirts	+ 5	- 7	- 5	+ 8
Knit sport shirts	- 3	+ 3	- 6	+ 4
Underwear	+ 5	+ 6	- 1	- 1

Source: Kurt Salmon Associates,
Soft Goods Outlook for 1985.

Dress Shirts

The following are the results of a survey of purchasers of men's dress shirts, conducted by the Gallup Organization and published in the September 1984 issue of Apparel Merchandising. The results of the survey indicate that consumers are still interested in fashion and moving to a wider variety of fashion dress shirts than just staying with the plain white button down shirt.

Men's Dress Shirt Fabric Preference

	All Cotton	Cotton Blend	All Polyester	No Answer
Men, total	39%	50%	6%	5%
Income:				
Under $10,000	46	41	5	8
$10,000 - $14,999	26	62	7	5
$15,000 - $24,000	31	52	8	9
$25,000 & over	40	52	4	4
Age:				
18 - 24 years	52	41	6	1
25 - 34 years	39	52	2	7
35 - 44 years	32	60	3	5
45 - 49 years	47	39	11	3
50 years & over	29	53	11	7

(continued)

CONSUMER BUYING HABITS

Dress Shirts

Men's Dress Shirt Fabric Preference
(continued)

	All Cotton	Cotton Blend	All Polyester	No Answer
Women, total	28	60	9	3
Income:				
Under $10,000	35	46	17	2
$10,000 - $14,999	33	62	5	--
$15,000 - $24,000	28	64	7	1
$25,000 & over	21	70	4	5
Age:				
18 - 24 years	37	57	6	--
25 - 34 years	36	50	10	4
35 - 44 years	28	61	8	3
45 - 49 years	12	81	--	7
50 years & over	22	62	12	4

Source: Gallup Organization,
Apparel Merchandising, September 1984.

Price Paid For Dress Shirts

	Less than $10.00	$10.00- $14.99	$15.00- $19.99	$20.00- $24.99	$25.00- $29.99	$30.00- $39.99	$40.00- & over	No Ans.
Total	7%	23%	33%	19%	8%	4%	2%	4%
Age:								
18 - 24	3	10	32	30	13	5	6	1
25 - 34	7	22	30	22	10	4	3	2
35 - 44	7	27	28	20	7	4	2	5
45 - 49	6	24	50	12	1	3	--	4
50 & over	11	27	34	14	6	4	--	4
Income:								
Under $10,000	16	29	31	14	3	1	1	5
$10,000 - $14,999	9	19	42	14	13	2	--	1
$15,000 - $24,999	5	26	34	18	7	5	1	4
$25,000 & over	5	19	30	25	8	7	3	3

Source: Gallup Organization,
Apparel Merchandising, September 1984.

CONSUMER BUYING HABITS

Dress Shirts

Planned Place of Purchase of Men's Dress Shirts

	Department Stores	Men's Specialty Stores	Mass Merchandisers	Discounters	Other Stores Types	No Answer
Men, total	43%	33%	27%	6%	10%	4%
Age:						
18 - 24	42	34	23	2	13	6
25 - 34	41	40	29	5	11	1
35 - 44	47	32	22	10	5	5
45 - 49	54	10	59	8	11	5
50 & over	41	36	25	7	7	3
Women, total	51	16	34	9	10	2
Age:						
18 - 24	55	14	43	8	5	3
25 - 34	51	16	33	9	14	1
35 - 44	47	17	32	15	11	3
45 - 49	66	9	23	6	9	6
50 & over	49	18	32	8	9	2

Source: The Gallup Organization, Apparel Merchandising, September 1984.

Neckwear

The following tables on neckwear purchases have been supplied by the NPD Textile and Apparel Market Index, a specialized service of NPD Research, Inc. Data are based on findings from an ongoing monthly panel diary tracking the purchases of 6,500 nationally representative families.

Consumer Purchases of Men's Neckwear by Store Type
(Percentages of Units Purchased)

	1983	1982
Department stores	36.6%	32.6%
Specialty stores	21.8	22.3
Discount stores	19.3	20.9
Mass merchandisers	15.2	16.3
Mail order	0.8	1.8
All other	6.3	6.1

(continued)

CONSUMER BUYING HABITS

Neckwear

Consumer Purchases of Men's Neckwear by Price Points
(Percentages of Units Sold)

	1983	1982
Less than $3.00	10.9%	15.6%
$3.00 - $4.99	18.3	23.9
$5.00 - $6.99	24.1	22.2
$7.00 - $8.99	16.9	17.3
$9.00 -$10.99	11.8	9.8
$11.00 - $12.99	6.3	4.4
$13.00 & over	11.7	6.9

Men's Hosiery

The trend noted in recent years toward more casual hosiery, and apparel in general, away from dressier attire for men continued in 1983. According to data compiled by NPD Special Industry Services in the Textile Apparel Market Index which tracks purchases reported by a nationwide, representative sample of 6,500 families, purchases of men's dress socks dropped from about 31% of total hosiery purchases in 1980 to about 26% in 1983. Athletic socks in the same period went up from 24% to over 32%.

Distribution of Reported Men's Hosiery Purchases by Type, 1980-1883

	Based on Pairs Purchased			Expenditures
	1983	1981	1980	1983
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Type of men's hosiery:				
Dress socks	25.9	28.9	31.3	30.4
Support socks	1.2	1.3	1.5	2.2
Casual socks	23.1	23.0	22.7	21.3
Athletic socks	32.3	25.5	23.8	30.2
Work socks	13.7	17.3	17.7	12.1
Other socks	3.7	4.0	3.0	3.9

Distribution of Reported Purchases of Hosiery For Men Age 17 & Older By Place of Purchase & By Price Classification, 1982, 1983

	1983		1982	
	Pairs	Expends.	Pairs	Expends.
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Outlet Type				
Department stores	13.5	18.6	13.0	18.6
Mass mdsrs. (incl. Sears, Ward, Penney, K-mart)	35.4	32.4	34.7	31.4
Discount stores	25.1	21.1	25.1	22.0
Specialty stores	5.7	8.1	4.0	5.3
Variety stores	6.4	5.3	7.2	6.0
Grocery stores/supermarkets	2.0	3.1	4.8	4.1
Other	11.8	11.4	11.2	12.6

(continued)

CONSUMER BUYING HABITS

Men's Hosiery

Distribution of Reported Purchases of Hosiery For Men Age 17 & Older By Place of Purchase & By Price Classification, 1982, 1983

	1983		1982	
	Pairs	Expends.	Pairs	Expends.
Total reported purchases (cont'd.)				
Price Paid				
Under $1.50	74.4%	51.5%	73.9%	52.0%
$1.50 - $1.99	11.6	15.2	13.3	17.7
$2.00 to $2.49	4.7	7.8	4.3	7.3
$2.50 or more	9.3	25.5	8.5	23.0

Source: NPD Special Industry Services, Textile and Apparel Market Index.

MEN'S WORK WEAR

Market Trends

Sales of work wear, through retail channels (not including the uniform market) have been quite flat since 1980, increased in 1984 with estimates of total retail sales reaching $2.2 billion in that year. Analysts believe that the main reason for the increased growth has come from the expansion of the category into home use. According to estimates by one of the nation's leading manufacturers of work wear, nearly 40% of work wear is bought for home or leisure wear.

The shift of reliance away from the institutional market comes at an extremely good time for the work-wear industry. According to the U.S. Bureau of the Census employment in blue-collar jobs is expected to grow at an annual rate of only 1.8% between 1982 and 1990.

The poor performance of the workwear industry over the last several years has resulted in a major shake-out of manufacturers in this industry. With several large manufacturers now out of the business, those remaining are now better able to profit from the increased open-to-buys left by the companies leaving.

Fashion has become increasingly important in the workwear industry. In 1984 the major thrust of retailers was in basic matched items (DNR, 2/21/85) of shirts, pants and overalls. Likewise retailers report a shift in color preferences moving away from the standard olive green towards navy blue.

According to a survey of workwear purchasers conducted by the Williamson-Dicki Co, men over 35 years old currently account for better than 50% of workwear purchases. The respondents cited that much of the purchases were primarily for home-use, and the major reason for the purchase of the apparel was comfort.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete census of manufacturers in the U.S. is compiled every five years by the U.S. Bureau of the Census. Data from the most recent census covering 1982 has now been released by the Bureau, the results of which are summarized below.

According to the 1985 U.S. Industrial Outlook, published by the U.S. Department of Commerce, International Trade Administration, the value of industry shipments in the men's work wear industry rose 2.7% between 1982 and 1984 climbing to a total of $4.7 billion. However this 1984 total was 6% less than the total registered in 1983.

Work Wear (SIC 2328*)

	1982	1977	% Change 1982/1977
Number of companies	305	347	- 12.1%
Number of establishments, total**	554	656	- 15.5
Number with 20 or more employees	461	575	- 19.8
Employees, total (thous.)	91.0	113.7	- 20.0
Production workers (thous.)	79.6	101.6	- 21.7
Payroll (mil. $)	838.7	719.4	+ 16.6
Value added by manufacture# (mil. $)	2,399.2	1,765.4	+ 35.9
Value of industry shipments## (mil. $)	4,661.2	3,641.9	+ 28.0
Capital expenditures, new (mil. $)	58.1	44.1	+ 31.7

(e) estimated

*SIC 2328 comprises establishments primarily engaged in manufacturing men's, youths' and boys' work shirts, pants, jeans, and other work clothing and washable service apparel. As noted above, uniforms and career apparel are not included, as they are primarily produced in the tailored clothing industry. For 1977 the 656 establishments (plants) in the industry included 361 manufacturers, 41 jobbers, 91 independent contractors and 163 multiplant company contractors.

**Each business location is counted as a separate establishment.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

(footnotes continued)

(footnotes continued)

##Value of shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The values of primary products (men's work clothing) alone, of these industries, plus the value of shipments by manufacturers classified in other industries who make suits, etc., as secondary products, are shown on page 37. Value figures are in current dollars, not adjusted for inflation.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982

Employment & Earnings

After recording a gain of 5.6% between 1982 and 1983, employment in the workwear industry fell in 1984. Between October 1984, employment in the industry was off 2.3%. Production worker employment followed the same pattern as total employment, rising in 1983 (+7.3%) but declining in 1984 (-1.4%). As previously noted, a number of manufacturers have left this industry in recent years.

Average weekly earnings have shown steady growth since 1982 on the other hand. This category grew by 3.8% between 1982 and 1983 while between October 1983 and 1984 it increased another 3.7%.

Employment & Earnings in the Workwear Industry

	Monthly Averages			Annual Averages		
	Oct. 1984(p)	Oct. 1983	% Change 1984/83	1983	1982	% Change 1983/84
Work clothing (SIC 2328*)						
All employees (thous.)	100.8	103.2	- 2.3%	97.5	92.3	+ 5.6%
Production workers (thous.)	85.9	87.1	- 1.4	82.3	76.7	+ 7.3
Avg. weekly earnings	$188.23	$191.30	- 1.6	$185.11	$167.92	+10.2
Avg. hourly earnings	$ 5.06	$ 4.88	+ 3.7	$ 4.91	$ 4.73	+ 3.8
Avg. weekly hours	37.2	39.2	- 5.1	37.7	35.5	+ 6.2
Avg. overtime hours	1.0	1.3	-23.1	1.2	0.9	+33.3

(p) preliminary
* For definition of SIC code, see page 31.

Source: U.S. Bureau of Labor Statistics,
Employment and Earnings.

Approximately four out of every 10 men's workwear manufacturers employed fewer than 100 employees in 1982 according to the U.S. Bureau of the Census. Only 6.5% of manufacturers of work wear, on the other hand had 250 or more employees in that year.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Manufacturing Establishments in the Work Wear Industry
By Employment Class Size, 1982

	Establishments		Employees	
	Number	% of Total	Number (Thous.)	% of Total
Men's & boys' work clothing (SIC 2328*), total	509	100.0%	94.6	100.0%
By establishment size:				
Under 50 employees	104	20.4	(D)	--
50 - 99 employees	96	18.9	7.2	7.6
100 - 249 employees	185	36.3	31.4	33.2
250 - 499 employees	91	17.9	30.9	32.7
500 or more employees	33	6.5	(D)	--

* For definition of SIC code, see page 31.
(D) Withheld to avoid disclosure.

Source: U.S. Bureau of the Census, County Business Patterns, 1982 (CBP-82-1).

LOCATION OF THE INDUSTRY

Tennessee and Texas were the leading states in production of men's workwear in 1982 according to the U.S. Census Bureau. These two states combined accounted for more than one out of every three dollars of shipments in that year. The six top states in production of work wear account for 60% of shipments and 55% of plants in 1982 according to the findings from the 1982 Census of Manufactures.

Leading States in the Manufacture of Work Clothing, 1982

	Total	With 20+ Employees	Value of Shipments (Mil. $)
Work clothing (SIC 2328*)			
Leading states:			
Tennessee	63	59	$ 866.3
Texas	64	55	809.3
Georgia	53	49	465.8
Alabama	46	42	204.9
Mississippi	42	41	307.0
Kentucky	37	34	209.2
U.S. total	554	461	4,661.2
Leading states, total	305	280	2,862.5
Percent of U.S.	55.1%	60.7%	61.4%

* For definition of SIC code, see page 31.

Source: U.S. Bureau of the Census, Census of Manufactures, 1982, Industry Series.

PRODUCTION

Information on production and shipments of work wear is compiled annually by the U.S. Census Bureau based on a sample survey and published in the Current Industrial Reports series. This is based on a survey of manufacturers, government contractors and jobbers, except the very small.

According to the latest annual report only two categories reported increases in shipments in 1983. These two categories, jeans & dungarees and overall & work-type jackets marked increases of 6.7% and 11.8%, respectively. Preliminary results for 1984 indicate that the work-pants category declined 4.9% while work shirts were up 7.4%.

Results of the 1983 and 1982 annual reports are summarized below.

Production of Specified Types of Work Wear, 1982, 1983

	Thousands of Dozen		% Change
	1983	1982	1983/82
Jeans & dungarees	12,392	11,596	+ 6.9%
Work pants, incl. waistband overalls	3,378	3,766	- 10.3
Coveralls, overalls, jumpsuits	1,109	1,220	- 9.1
Washable service apparel	1,247	1,257	- 0.8
Work shirts (men's & boys')	2,978	2,978	--
Uniform shirts	955	1,065	- 10.3
Overall & work-type jackets (men's & boys')	208	186	+ 11.8

Source: U.S. Bureau of the Census, Current Industrial Reports, (Series MA-23E(83)-1)

By Fabric/Construction

Production of Specified Types of Men's & Boy's Work Wear By Type of Fabric & Construction, 1982, 1983
(Thousands of Dozens)

	1983	1982	% Change 1983/82
Men's jeans & dungarees	12,392	11,596	+ 6.9%
All cotton & chiefly cotton	11,543	10,742	+ 7.5
All man-made & chiefly man-made	629	681	- 7.6
Fabric, n.s.k.	242	173	+ 39.9

(continued)

PRODUCTION

By Fabric/Construction

Production of Specified Types of Men's & Boys' Work Wear
By Type of Fabric & Construction, 1982, 1983
(Thousands of Dozens)
(continued)

	1983	1982	% Change 1983/82
Men's work pants, incl. waistband overalls	3,378	3,766	- 10.3%
By construction:			
Woven fabric	3,080	3,404	- 9.5
Knit fabric	17	34	- 50.0
Construction, n.s.k.	281	338	- 16.9
By fabric:			
All cotton & chiefly cotton	712	844	- 15.6
All man-made & chiefly man-made	2,225	2,189	+ 1.6
Fabric, n.s.k.	441	743	- 40.6
Men's coveralls, overalls & jumpsuits	1,109	1,220	- 9.1
By construction:			
Woven fabric	960	1,014	- 5.3
Knit fabric Construction, n.s.k.	149	206	- 27.7
By fabric:			
All cotton & chiefly cotton	489	535	- 8.6
All man-made & chiefly man-made	446	472	- 5.5
Fabric, n.s.k.	174	213	- 18.3
Men's washable service apparel	1,247	1,257	- 0.8
By fabric:			
All cotton & chiefly cotton	212	173	+ 22.5
All man-made & chiefly man-made	906	907	- 0.1
All other fabric	41	83	- 50.6
Fabric, n.s.k.	88	94	- 6.4
Men's & boys' work shirts	2,978	2,978	--
By fabric:			
All cotton & chiefly cotton	719	706	+ 1.8
All man-made & chiefly man-made	2,074	2,095	- 1.0
All wool & chiefly wool All other fabric Fabric, n.s.k.	185	177	+ 4.5
Men's & boys' overall & work-type jackets	208	186	+ 11.8
By fabric:			
All cotton & chiefly cotton	110	74	+ 48.6
All man-made & chiefly man-made	93	107	- 13.1
Fabric, n.s.k.	5	5	--

Source: U.S. Bureau of the Census, Current Industrial Reports, Men's Outerwear, MA-23E(83)-1.

PRODUCTION

Materials Consumed in Production

Value of Materials Consumed in the Production of Work Wear, 1977, 1982

	Delivered Cost (Mil. $)		
	1982	1977	% Change 1982/1977
Work wear (SIC 2328*):			
Broad woven fabrics	$1,285.0	$1,194.5	+ 7.5%
Purchased knitted fabrics	79.0	23.8	+231.9
All other materials, containers & supplies	396.7	390.1	- 8.2

* For a definition of SIC code, see page 31.

Source: U.S. Bureau of the Census, Census of Manufactures, 1982, Industry Series

Seasonality in Production

Based on reports from the U.S. Census Bureau on production of men's work wear, May is the busiest month for cuttings of both men's work pants and work shirts. May accounted for 9.7% of total 1984 cuttings of work pants while it represented 9.4% of cuttings on work shirts.

Percent of Cuttings Done by Month of Selected Types of Men's Work Wear 1983, 1984

	Men's Work Pants		Men's Work Shirts	
	1984	1983	1984	1983
Total	100.0%	100.0%	100.0%	100.0%
January	9.1	7.1	8.2	9.0
February	8.8	7.2	8.4	8.4
March	9.4	8.6	9.1	8.3
April	9.1	7.6	8.4	7.7
May	9.7	8.3	9.3	8.5
June	9.8	8.9	8.7	8.7
July	8.6	6.2	6.7	7.0
August	9.1	8.6	9.4	9.1
September	7.9	9.1	7.9	9.2
October	7.7	9.1	9.6	8.9
November	6.1	9.1	7.6	8.5
December	4.6	7.5	6.8	6.9

Source: Based on U.S. Bureau of the Census, Current Industrial Reports, Men's & Boys' Outerwear, MA-23E(81)-1.

SHIPMENTS

According to the International Trade Administration, U.S. Department of Commerce, product shipments of men's and boys' work wear (including all producers, regardless of industry classification) slipped 2.3% in 1984 after a climb of 9.3% between 1982 and 1983. The total value of product shipments was estimated by the I.T.A. to have reached $3.9 billion in 1984.

Results from the 1982 census of manufactures are summarized below.

Value of Shipments of Work Wear, by All Producers, 1977, 1982
(Millions of Dollars)

	1982	1977	% Change 1982/1977
Men's & boys' work wear, total	$4,022.9	$3,394.3	+ 18.5%
Men's & boys' work shirts	242.5	191.6	+ 26.6
Men's & boys' jeans & jean-cut casual slacks	2,543.9	1,962.8	+ 29.6
Men's jeans & dungarees	1,443.4	1,310.9	+ 45.6
Men's jean cut casual slacks	464.8		
Men's work pants	365.0	561.0	+ 3.2
Men's overalls & jumpsuits	214.2	77.3	+ 31.3
Men's washable service apparel	101.5	20.7	+ 74.9
Men's & boys' overall & work-type jackets	36.2	411.2	- 8.8
Contract & commission work on men's & boys' work clothing	375.9	99.0	- 5.5
Work clothing, n.s.k.	93.6		

n.s.k. not specified by kind.
(p) preliminary

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982

Later data, covering 1983, is available on shipments of men's work wear by U.S. manufacturers through the Current Industrial Reports series, compiled on the basis of a survey by the Census Bureau. The survey covers manufacturers as well as contractors and jobbers.

SHIPMENTS

Value of Shipments of Work Wear, 1982, 1983

	Millions of Dollars 1983	1982	% Change 1983/1982
Work wear, total (men's only, except where noted)	$2,728.9	$2,403.7	+ 13.5%
Jeans & dungarees	1,777.8	1,443.4	+ 23.2
Work pants, incl. waistband overalls	348.9	365.0	- 4.4
Coveralls, overalls, jumpsuits	197.4	214.2	- 7.8
Washable service apparel	104.3	101.5	+ 2.7
Work shirts (men's & boys')	260.0	243.4	+ 6.8
Overall & work-type jackets (men's & boys')	40.5	36.2	+ 11.9

Source: U.S. Bureau of the Census, Current Industrial Reports, (Series MA-23E(83)-1 (issued June 1984).

According to the 1983 CIR on gloves and mittens, the value of shipments of work gloves and mittens declined 6.6% between 1982 and 1983 while the quantity of shipments was off by 5.4%. Leather and fabric combination gloves recorded the sharpest drop falling 7.7% in units while all fabric gloves were down 4.8%.

Quantity & Value of Shipments of Work Gloves & Mittens, 1982, 1983
(Quantity in 1,000 dozen pairs; value in million dollars)

	Quantity 1983	1982	% Change 1983/82	Value 1983	1982	% Change 1983/82
Work gloves & mittens, total	18,335	19,379	- 5.4%	$266.6	$285.4	- 6.6%
All fabric	16,065	16,883	- 4.8	151.7	160.1	- 5.2
Single-canton flannel	3,542	4,031	-12.1	na	na	--
Double-canton flannel	3,184	3,278	- 2.9	na	na	--
Fleeced-cotton jersey	2,794	2,705	+ 3.3	na	na	--
Circular-knit cotton	3,870	4,192	- 7.7	na	na	--
Coated & partially-coated fabrics	1,934	2,065	- 6.3	na	na	--
All other fabrics	786	612	+28.4	na	na	--
Leather & fabric combination	831	898	- 7.5	34.7	36.6	- 5.2
All leather work gloves	1,615	1,747	- 7.6	88.5	95.5	- 7.3
All grain, exc. welders	975	1,017	- 4.1	na	na	--
All split, exc. welders	427	418	+ 2.2	na	na	--
Leather, exc. all grain & all split, incl. welders	213	312	-31.7	na	na	--

na not available

Source: U.S. Bureau of the Census, Current Industrial Reports, Gloves and Mittens, MA-23D(83)-1

PRODUCER PRICES

According to the U.S. Bureau of Labor Statistics, the only measured category of producer (factory) prices to register an increase less than that of all men's and boys' wear was one-piece work suits between December 1983 and December 1984. The largest increase in producer prices between December 1983 and 1984 was recorded by washable service apparel which recorded an increase of 2.7%.

Producer Prices of Specified Work Wear, 1982-1984
(1967=100, unless specified)

	December		% Change	Annual Av.		% Change
	1984	1983	1984/83	1983	1982	1983/82
All items	310.7	306.1	+ 1.5%	303.1	299.3	+ 1.3%
Men's & boys' wear	228.5	223.9	+ 2.1	222.4	219.5	+ 1.3
Men's washable service apparel*	103.1	100.4	+ 2.7	100.1	99.6	+ 0.5
Men's one-piece work suits*	101.9	99.9	+ 2.0	na	98.7	--
Men's work pants	249.2	243.3	+ 2.4	237.7	231.4	+ 2.7
Men's dungarees & overalls**	150.3	146.9	+ 2.3	146.4	145.1	+ 0.9

*12/81 = 100 ** 1977 = 100 na not available

Source: U.S. Department of Labor,
Bureau of Labor Statistics.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The U.S. Bureau of Labor Statistics estimates that between 1982 and 1995 the number of people employed in non-professional positions is expected to grow at an annual rate of 1.8%. Even with people buying work wear for uses other than at work, industry analysts only expect the market to grow at a 1.5% annual rate during this period.

Service occupations requiring uniforms which are not usually supplied through regular retail channels (and not included in the data reported at the retail level in this Fact File) represent a growing market; factory workers, a generally declining market as U.S. industry is registering increasing declines under pressure from imports. (The career uniform market has also been growing among businesses which wish to establish their own identity with their customers).

Employed Civilians by Occupation & by Sex, 1982, 1984

	Total		Men		Women	
	1984	1982	1984	1982	1984	1982
Total, 16 years & over (thous.)	105,005	99,526	59,091	56,271	45,915	43,256
Percent	100.0	100.0	100.0	100.0	100.0	100.0
Managerial & professional specialty	23.7	23.3	24.6	24.5	22.5	21.7
Executive, administrative, mangerial	11.0	10.7	13.0	12.8	8.5	7.8
Professional specialty	12.7	12.6	11.6	11.6	14.0	13.9

(continued)

THE POTENTIAL MARKET

Employed Civilians by Occupation & by Sex, 1982, 1984
(continued)

	Total		Men		Women	
	1984	1982	1984	1982	1984	1982
Tech., sales & admin. support	30.9	30.9	19.6	19.5	45.6	45.7
Technicians & related support	3.0	3.0	2.8	2.9	3.3	3.2
Sales occupations	12.0	11.3	11.1	10.9	13.1	11.9
Admin. support, incl. clerical	15.9	16.6	5.7	5.8	29.1	30.7
Service occupations	13.5	13.6	9.4	9.4	18.7	19.0
Precision production, craft, repair	12.4	11.9	20.2	19.4	2.4	1.9
Operators, fabricators, laborers	16.1	16.6	21.1	21.5	9.6	10.3
Farming, forestry, fishing	3.4	3.8	5.1	5.6	1.2	1.4

Source: U.S. Bureau of Labor Statistics:
Employment & Earnings (January 1985)

RETAIL SALES

Recent estimates for the work wear market (not including uniforms, etc., supplied through other than retail channels) put retail sales at about $2 billion in 1983 about double the market in 1977. Final data on workwear sales by type of outlet from the 1983 Census of Retail Trade are scheduled to be released by the Census Bureau in late 1985. Meanwhile, following are some preliminary census findings for apparel, specialty stores.

Percent of Total Store Sales Accounted for by
Men's Career/Work Uniform in Specified Store Types, 1977, 1982

	Total Retail Sales (Million $)	% of Sales Accounted for by Men's Career/Work Uniforms	
	1982(p)	1982(p)	1977(r)
Men's & boys' wear stores	$ 7,685.8	2.3%	2.8%
Family clothing stores	13,471.4	0.8	2.4

(r) revised
(p) preliminary

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade (preliminary)

CONSUMER BUYING HABITS

The following are the results of a survey on men's work wear conducted by Red Kap, a division of Blue Bell. The survey covered purchases in this category.

Men's Workwear Sales by Type of Retail Outlet, 1983

Total sales	100.0%
Mass merchandisers	45.0%
Department stores	13.0%
Discounters, incl. K Mart	21.0%
Catalog chains	2.0%
All others	19.0%

Men's Workwear Sales by Type, 1983

Total sales	100.0%
Work jeans	31.0
Work sets	17.0
Coveralls	14.0
Overalls	13.0
Work shirts	12.0
Work coats & jackets	11.0
Other	2.0

Source: Red Kap, Division of Blue Bell, Apparel Merchandising, August, 1984.

FAIRCHILD FACT FILES CURRENTLY AVAILABLE

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, merchandising and operating results, and seasonal patterns in advertising. Also focuses on consumer buying habits and plans. (August)

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age, personal income, the labor force, employment and earnings, households and living arrangements. Also covers trends in consumer prices, in personal consumption expenditures by product classification and in retail sales by store types, and the outlook for consumer markets based on current economic trends. (1984 Edition available now--1985 Edition will be available in February, 1986)

DEPARTMENT STORE SALES: (Including selected major apparel specialty store sales) Covers sales of department stores, and the number of stores operated, listed by geographic region and state based on buying headquarter location. Also lists branch store sales, where available. Sale information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1984 Edition available now--1985 Edition will be available in January, 1986)

DRESSES (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress industry, including trends in the number of manufacturers, and in production and shipments. Also data on fabric types and manufacturers' price lines and shipments by region of the country. Includes estimates on retail sales and data on the consumer market in terms of important demographic data.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories for men and women, including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as available retailer and consumer data. Also covers important fashion developments.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and the footwear markets. Covers domestic production and shipments, as well as imports. Provides retail sales and merchandising statistics and buying habits. (1984 Edition available now--1985 Edition will be available in August, 1985)

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and consumer patterns are also covered.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending in terms of major demographic characteristics.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Also covers information on the geographic location and size of manufacturers. Retail information includes sales by store type, trends in furniture styles and materials and market demographics. Features results of a consumer survey on furniture and bedding buying habits.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores. Also covers data on purchases of children's wear by price line and season. (July)

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes. Imports are covered, retail trends and merchandising ratios, and data on consumer purchases by price point, store type and month.

MAJOR APPLIANCES AND ELECTRICAL HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including heating, laundry and cooking appliances for household use, cleaning equipment, and personal care appliances. Details production and shipments, sales trends, retail merchandising results, more. (Includes a new consumer buying intention survey) (September)

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, imports, exports, market trends, retail sales and consumer buying practices. Trendy data, such as developments in Western wear, designer labels, fashion jeans and active wear, are included.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: (Including Tailored Casual Wear) Manufacturer level profiled by production value of shipments, employment, size of firms. Imports from key foreign sources by unit and dollar value are covered. Data is also presented on retail sales, merchandising and consumer buying habits. (November)

PERSONAL ELECTRONICS: A statistical summary of the market for electronic equipment designed for individuals. Product categories include televisions, radios, stereos, personal stereos, home computers, videosystems and videogames. Data is presented on both the manufacturer and the retailer level. Also includes a section on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the fast-growing markets for sports facilities and equipment, for footwear and apparel designed not only for serious sports participants but those who like the "look" for leisure wear, and for products involved in life styles related to interest in sports and physical fitness.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits. Also included is information on departmental merchandising and operating results, as well as important developments in retailing, such as the designer's label.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons are made with findings in the last previous census, covering operations in 1977. (December)

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, U.S. mills, as well as exports and imports. Covers capital expenditures and data on mill machinery. (July)

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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